NBS Travel Manager Organization Administrator

Student Guide

As of 01AUG04

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NATIONAL INSTITUTES OF HEALTH
BUSINESS & RESEARCH SUPPORT SYSTEM
Organization Administrator Introduction
February, 2004

Introduction

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Organization Administrator Role

Organization Administrator Role

- This is a new role for the NIH community.
- Organization Administrators at each OD/IC will be responsible for limited custom configurations to comply with individual OD/IC policies and procedures.
  - Add/delete personnel to role assignments for document routing
  - Edit document routing lists
  - Assign routing lists to new travelers
  - Remove locks from Edit Locked documents
  - Maintain information in Traveler profiles
- Each OD/IC has identified at least one person to serve in this role, with an additional person for backup, as necessary.
- The role is being added to the responsibilities of existing FTEs.

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Email Notices

- Email Notices sent for the following reasons:
  - To routing list members -- when a travel document needs his/her review or approval
  - To Travelers -- when a document needs their certification
- Organization Administrators are responsible for maintaining the correct email address for the NBS Travel System
  - Update email addresses in the Traveler Information screen

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Workflow

- Organization Administrator is responsible for maintaining/editing the workflow (routing of travel documents) in the NBS Travel System
- New employees enter the NBS Travel System via the HR import
  - Organization Administrator adds him/her to the Group (IC) and assigns the new traveler to a routing list
- Non NIH Affiliated travelers are added via a request form to OFM
  - Organization Administrators submit the request to OFM via an Oracle Applications form

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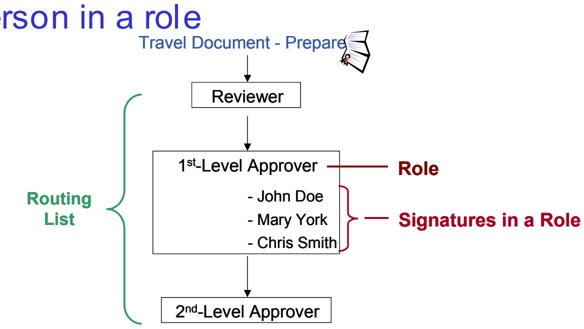
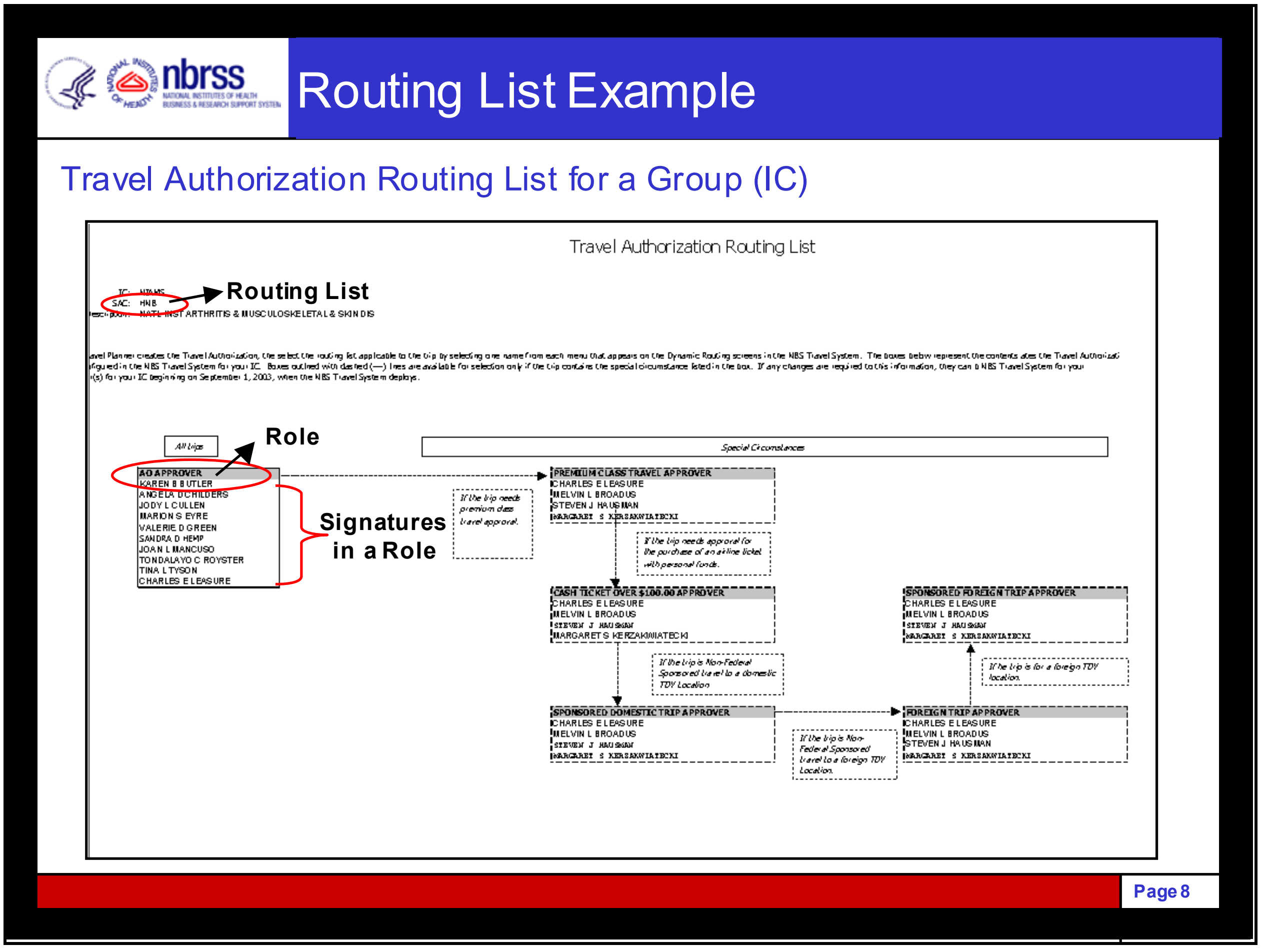
GTM Admin Module Important Terms

- Group = IC
  - A composite of individuals who have something in common
- Routing List = hierarchical list of recipients for a travel document
  - The electronic path that travel documents flow through the NBS Travel System. This is customized by each IC.
- Role = Job Title
  - The group of personnel who sign travel documents at each stage in the routing list.
- Signature in a Role = individual person in a role




nbrss
Routing List Example
Travel Authorization Routing List for a Group (IC)
Travel Authorization Routing List
Routing List
SAC: HNB
NATL INST ARTHRITIS & MUSCULOSKELETAL & SKIN DIS
Role
All trips
AO APPROVER
KAREN B BUTLER
ANGELA D CHILDERS
JODY L CULLEN
MARION S EYRE
VALERIE D GREEN
SANDRA D HEMP
JOAN L MANCUSO
TONDALAYO C ROYSTER
TINA L TYSON
CHARLES E LEASURE
Signatures in a Role
Special Circumstances
If the trip needs premium class travel approval.
PREMIUM CLASS TRAVEL APPROVER
CHARLES E LEASURE
MELVIN L BROADUS
STEVEN J HAUSMAN
MARGARET S KERSAKWIATECKI
If the trip needs approval for the purchase of an airline ticket with personal funds.
CASH TICKET OVER $100.00 APPROVER
CHARLES E LEASURE
MELVIN L BROADUS
STEVEN J HAUSMAN
MARGARET S KERZAKWIATECKI
If the trip is Non-Federal Sponsored travel to a domestic TDY Location
SPONSORED DOMESTIC TRIP APPROVER
CHARLES E LEASURE
MELVIN L BROADUS
STEVEN J HAUSMAN
MARGARET S KERSAKWIATECKI
If the trip is Non-Federal Sponsored travel to a foreign TDY Location.
FOREIGN TRIP APPROVER
CHARLES E LEASURE
MELVIN L BROADUS
STEVEN J HAUSMAN
MARGARET S KERSAKWIATECKI
If the trip is for a foreign TDY location.
SPONSORED FOREIGN TRIP APPROVER
CHARLES E LEASURE
MELVIN L BROADUS
STEVEN J HAUSMAN
MARGARET S KERSAKWIATECKI
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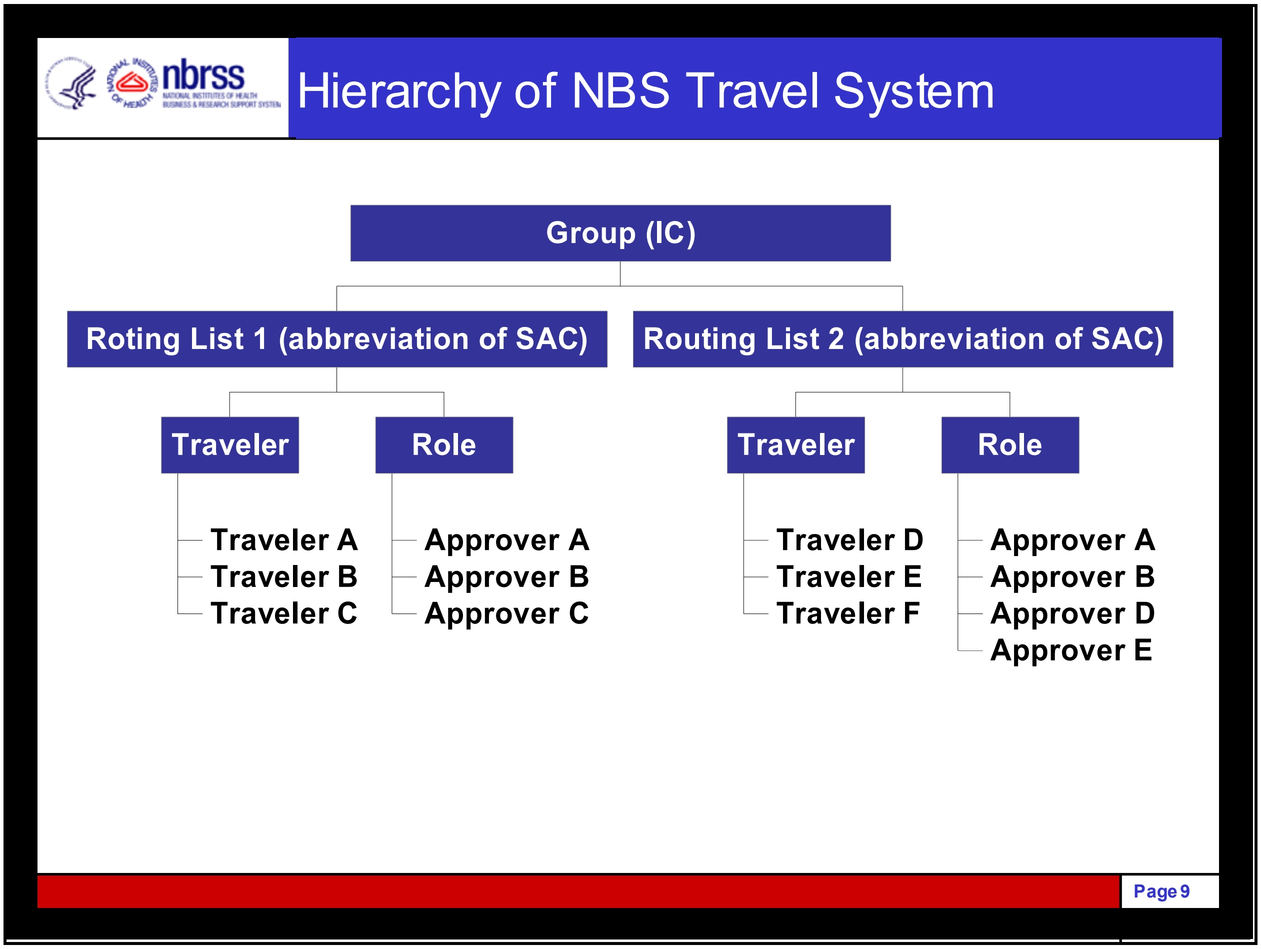
Hierarchy of NBS Travel System



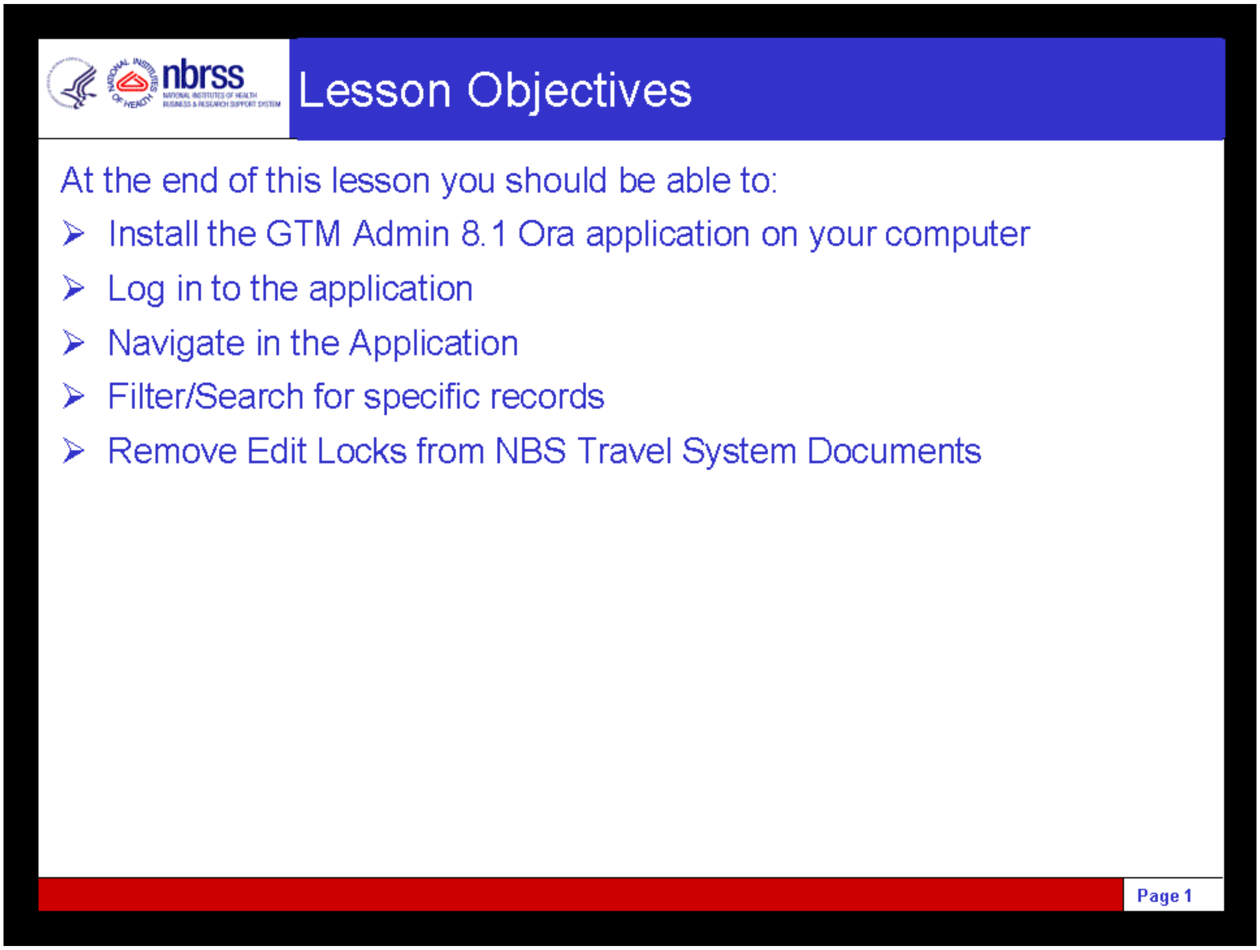
An IC may have more than one Routing List. The example above shows the IC as having two different routing lists. Travelers can only be assigned to one routing list, whereas an Approver may approve travel for multiple routing lists.

Organization Administration Basics

Chapter 2


nbrss
NATIONAL INSTITUTES OF HEALTH
BUSINESS & RESEARCH SUPPORT SYSTEM
Organization Administrator Basics
February, 2004

Lesson Objectives



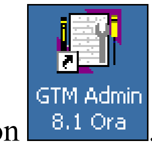
Installing the GTM 8.1 Admin Module

Installing the GTM 8.1 Admin Module

- The Gelco Travel Manager 8.1 Administration Module is a desktop application
- Users must have a static IP address to use the application
- Users must have completed the Access Request form on the NIH Portal in the Travel Users Community
  - User Id and Password are assigned
  - You will need to reset your password and establish a signature PIN at the initial log on
- Contact the NBS Help Desk. Inform them you are a new Organization Administrator and require download application link and instructions.
- For assistance with installing the application, check with your IT staff

Log in to the GTM Admin Module

Organization Administrator
Start>Programs>GTM Webclient Application>GTM Admin 8.1 Ora
Account Administrator Login Window

Note: Alternatively double-click on the **GTM Admin 8.1** desktop icon .

1. In the **User ID** field, type your user ID and press the [TAB] key.

   Note: **User ID** = NBSXXXXX (where XXXXX is your unique 5-digit number)

2. In the **Password** field, type your password.

   Note: For all new users, the initial password will be **newtrav1**.

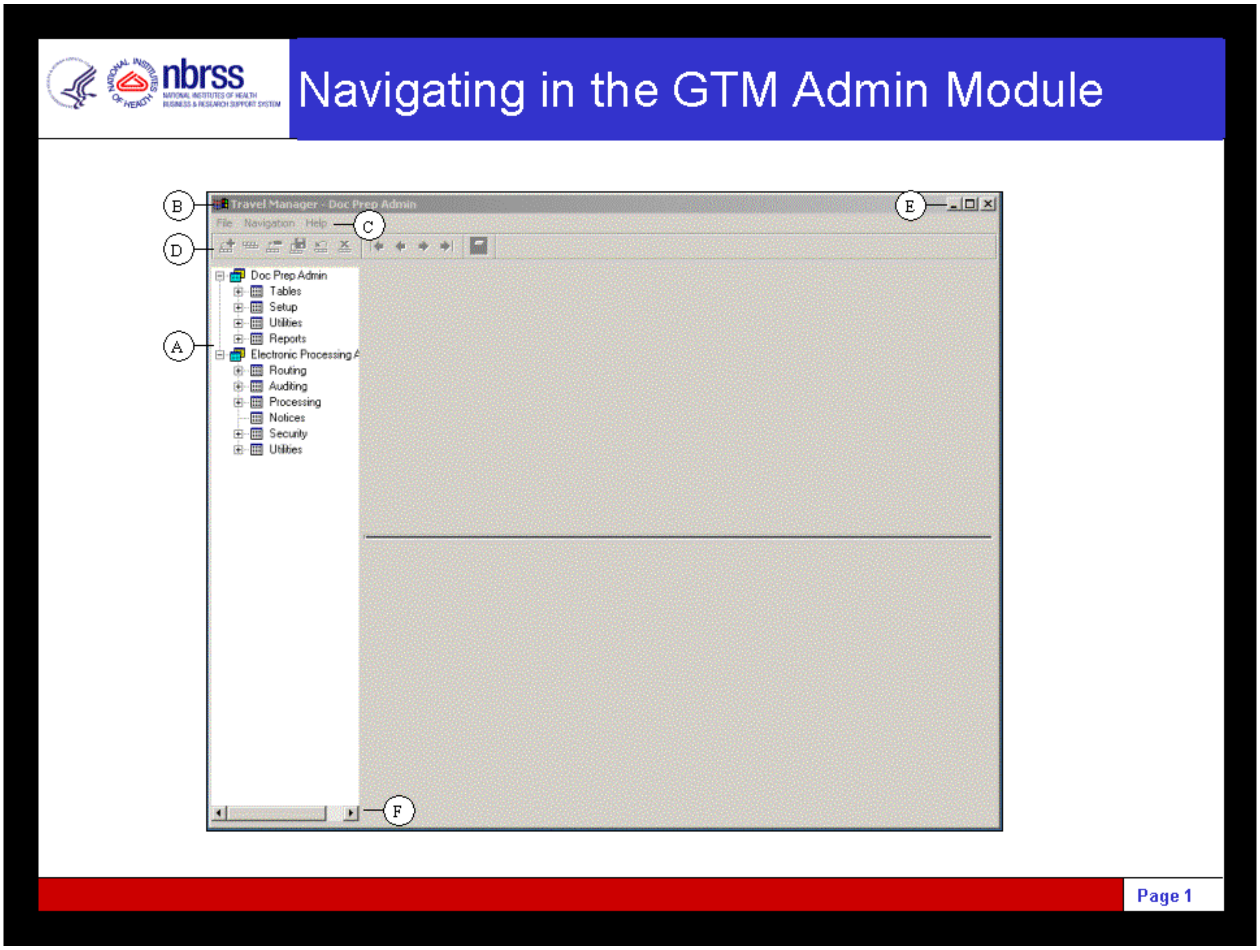
   Once logged in, you will be asked to change your password from newtrav1 to something else. Subsequently, you will be asked to establish a signature PIN.

3. Select the **Login** button .

   Result: The Doc Prep Admin Main Window will appear.

End of activity.

Navigating in the GTM Admin Module



A – **Navigation Tree** allows the user to move between the different utilities available in the application.

B – **Window Title** contains name of the utility or window that is currently open.

C – **Menu Toolbar** contains three different pull down menus available for use while in the application.

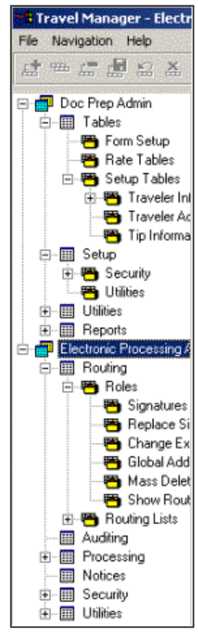
D – **Document Toolbar** offers shortcut icons to options available in the pull down menus.

E – **Minimize/Maximize/Close** buttons control the window allowing a user to minimize a window, enlarge it to full size or close the application.

F – **Horizontal Scroll Bar** moves left or right (using the arrows or sliding the bar) to view the farthest portion of the Navigation Tree when you expand to more detailed hierarchy utilities within the Navigation Tree.

Navigation Tree

- Two main utilities: Doc Prep Admin and Electronic Processing Admin
- To expand levels, click the plus sign (+)
- To collapse, click the minus sign (-)
- To select a sub-utility, click directly on the title
  - Window appears to the right



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Utilities Navigation

Expand and Collapse Utilities

This activity is performed whenever an Organization Administrator needs to expand or collapse the navigation tree to find a particular utility.

1. Select the plus (⊞) sign to the left of each utility to expand.

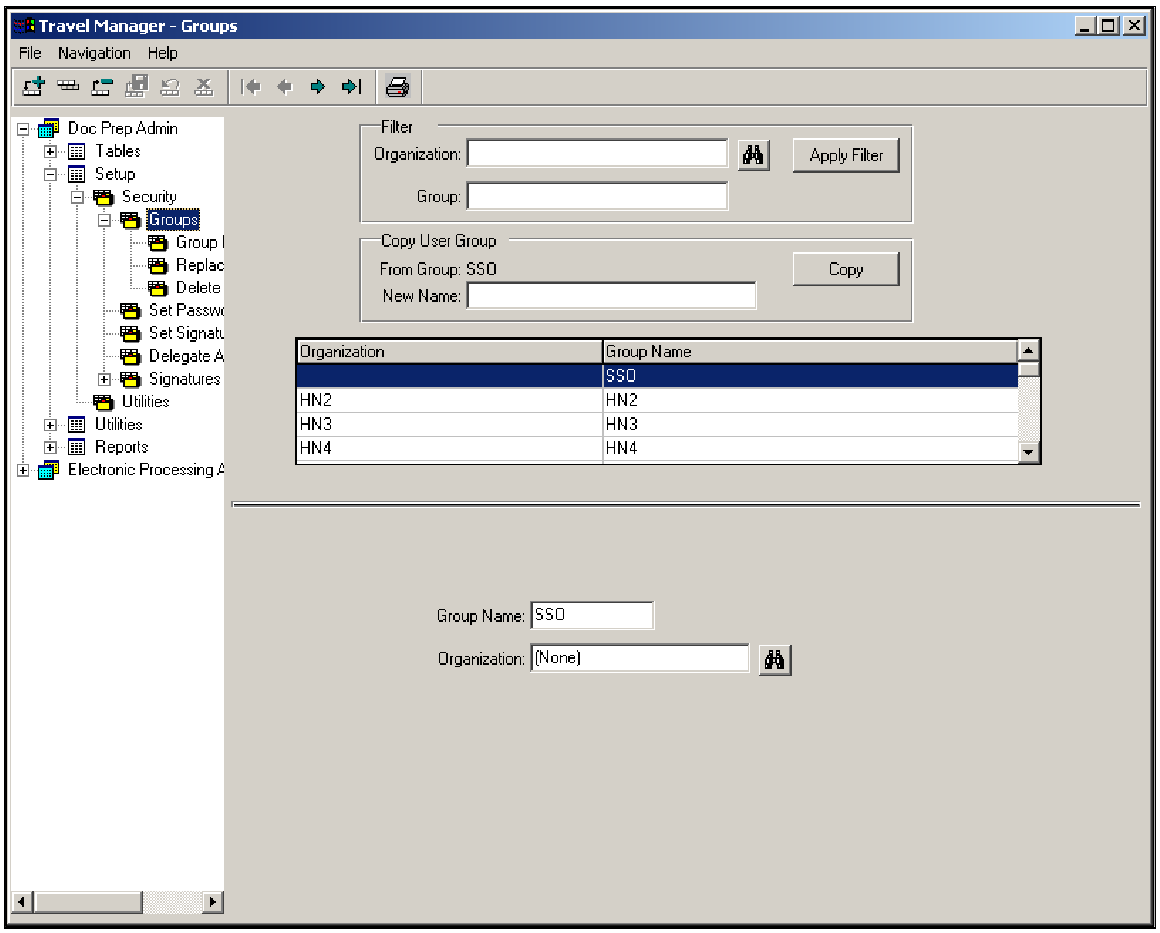
2. Select the minus (⊟) sign to the left of each utility to collapse.

Navigate to the Groups Utility

Organization Administrator
N> Navigation Tree, select Doc Prep Admin>Setup> Security>Groups
Groups

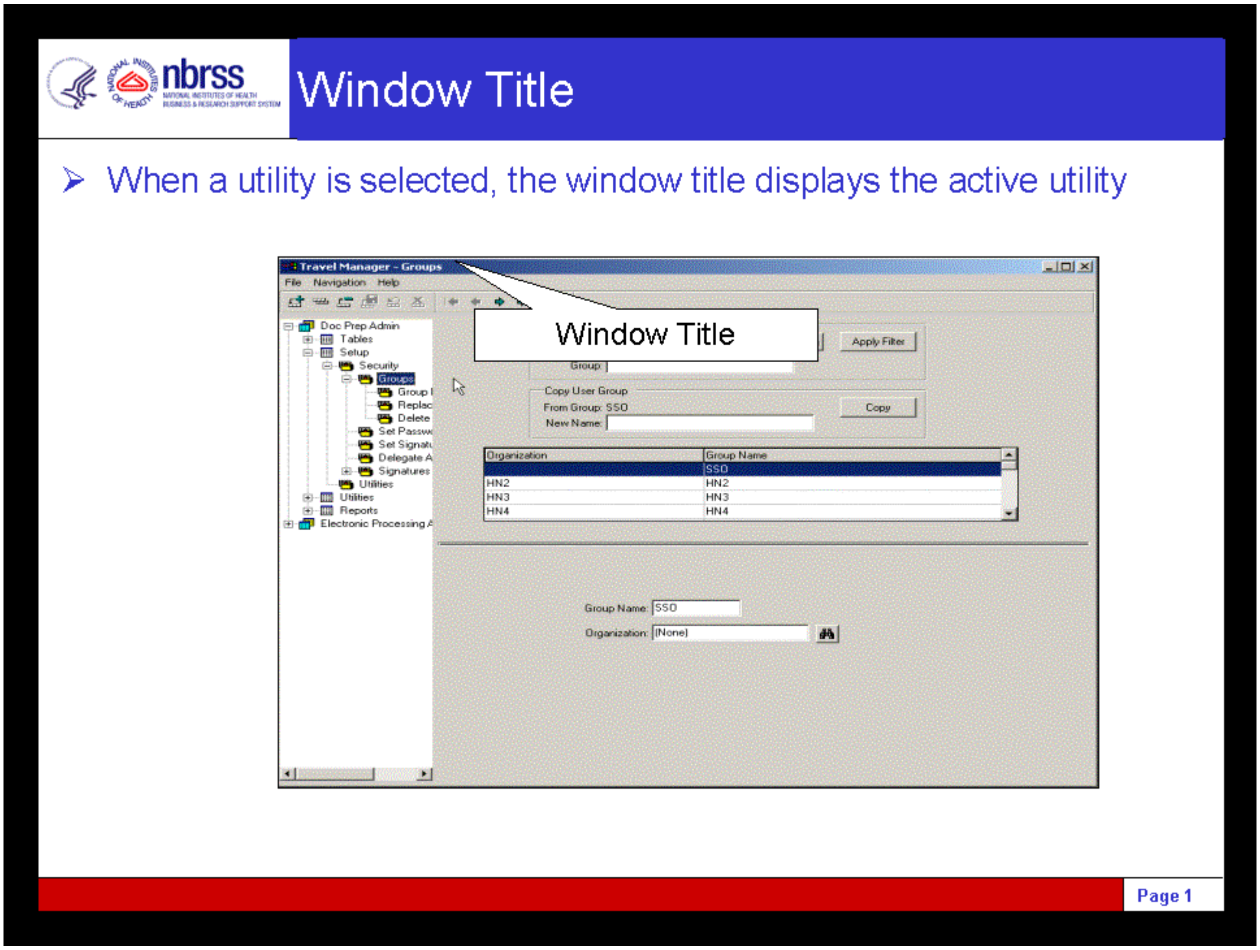
1. View the **Window Title**, it should read 'Travel Manager – Groups.'

   <u>Result</u>: Your screen should look similar to the one below.

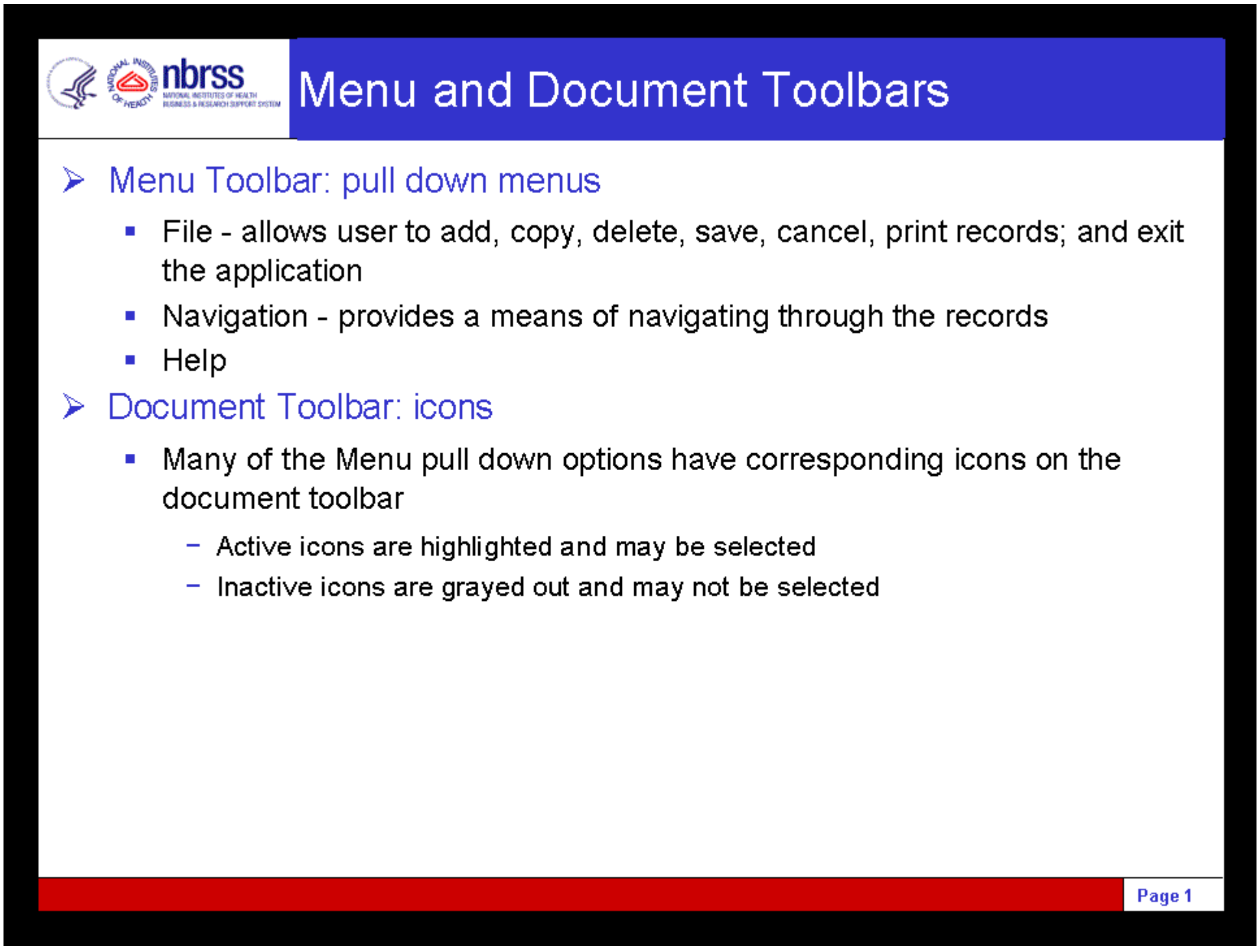


End of activity.

Window Title



Menu and Document Toolbars



File menu:

•**Add record –** When this menu item is available, you are permitted to add a record (or entry) to the current field in which you are working. To do so, select File>Add record, and then enter the necessary information into the fields in the window.

•**Copy record –** When this menu item is available, you are permitted to copy a record. In some cases, you must highlight a record from the browser first, and then select File>Copy record.

•**Delete record –** When this menu item is available, you are permitted to delete a record. In some cases, you must highlight a record from the browser first, and then select File>Delete record. Usually, you will be prompted with a message, "Are you sure you want to delete this record?" to confirm that you want to delete. Select the YES button to delete.

•**Save record –** After you add or update a record, you must ALWAYS select File>Save record (or select the Save Record icon). Otherwise the changes will not be saved.

•**Reset –** When this menu item is available, you may use it to clear out information from all the fields in the window. To do so, select File>Reset.

•**Cancel –** When this menu item is available, you may use it to cancel any changes you are making in the fields or records. To do so, select File>Cancel.

- **Print –** Select File>Print. Adobe Acrobat Reader displays the print preview of the document or report. From the Acrobat Reader window, select File>Print to print a hard copy.
- **Exit –** To exit the GTM 8.1 Administrative Module, select File>Exit.

Navigation Menu:

- **First –** To move to the first record in the browser, select Navigation>First.
- **Previous –** To move to the previous record in the browser, select Navigation>Prev.
- **Next –** To move to the next record in the browser, select Navigation>Next.
- **Last –** To move to the last record in the browser, select Navigation>Last.

Help Menu:

Help Topics – Search for assistance with a specific topic.

Federal Travel Regulation – Launch a separate Adobe window containing Federal Travel Regulations. Do NOT use this function as it is not updated regularly and you may be accessing out of date regulations.

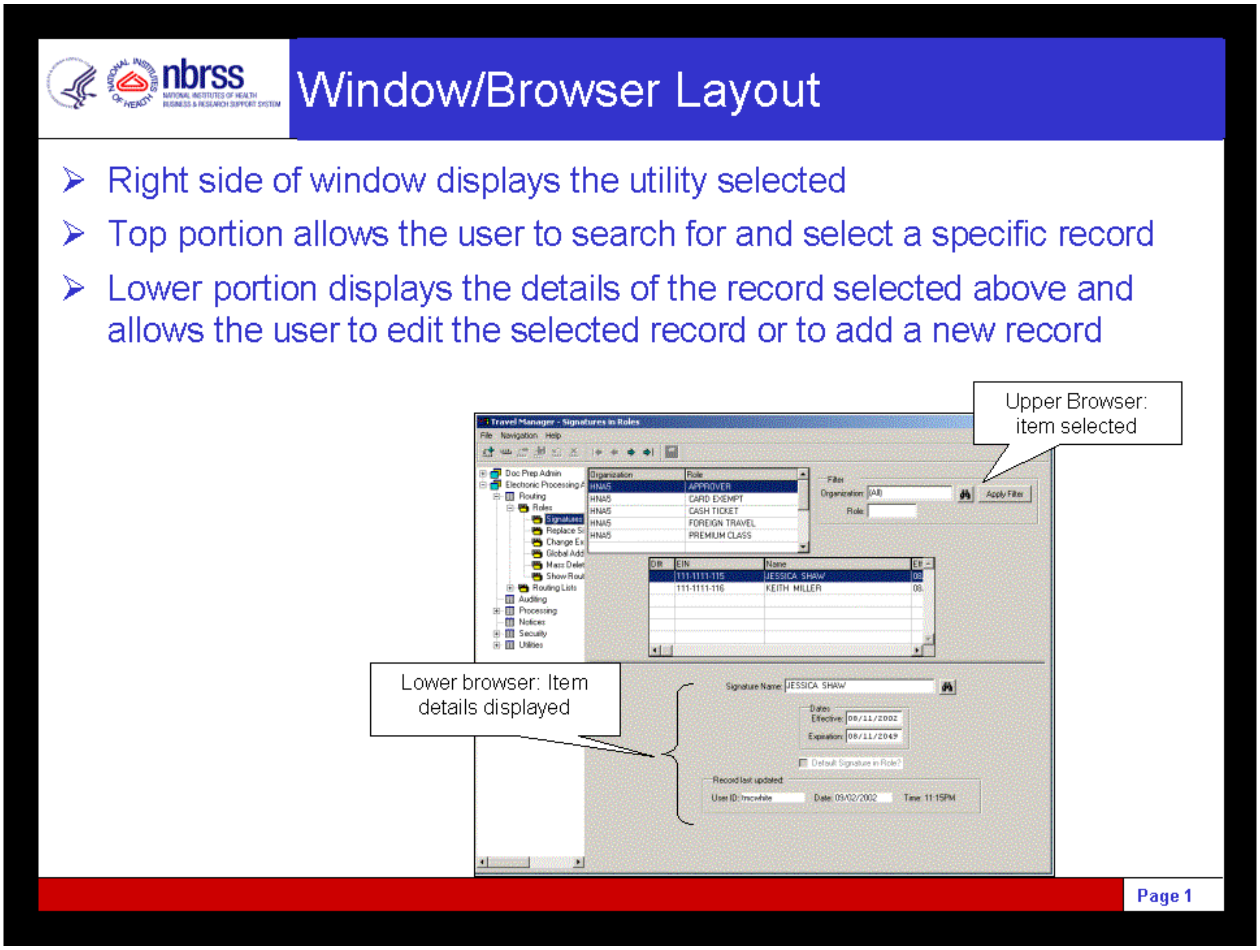
Tips – Display some tip information for the browser that is currently open. You can access this feature while you are in a utility's browser.

Who Am I – Find the user name that was used to log in. The 'Who Am I' browser displays the user's name, group, organizational access, and his/her permission level setting. To exit this browser, select the CLOSE button.

About Travel Manager – Display information on your version of the GTM Administration Module. The browser displays the mode (CIV or Civilian, CRC or DoD), the serial number, and copyright of the software you are accessing. For the NBS Travel System the mode is CIV (Civilian). To exit the browser, select the OK button.

Exit to OS Shell – Access the operating system's command interpreter, so that you may run other software or issue operating commands without exiting the Administration Module. Note: It is anticipated that the Organization Administrator will NOT need this feature. In the event you select it, type 'Exit' at the operating system prompt to return to the Administration Module, and select your [ENTER] key.

Window/Browser Layout



Utilities in the GTM Admin Module

Utilities in the GTM Admin Module

- Doc Prep Admin:
  - Doc Prep Admin>Tables: only using Set Up Tables for the Traveler Profile
  - Doc Prep Admin>Setup: using the Group Members sub-utility
  - Doc Prep Admin>Utilities: using the Remove Edit Lock sub-utility
- Electronic Processing Admin: provides functions necessary to administer electronic document processing; only using the Routing sub-utility
  - Electronic Processing Admin>Routing>Roles
    - Create, delete or edit roles
    - Add, delete or replace signatures in a role
  - Electronic Processing Admin>Routing>Routing Lists
    - Create, delete or edit routing lists (electronic path of NBS Travel System documents)

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GTM Admin Module Common Navigation Paths

GTM Admin Module Common Navigation Paths

Remove Edit Locks	Doc Prep Admin>Utilities>Document Utilities>Remove Edit-Locks
Add a Role	Electronic Processing Admin>Routing>Roles
Delete a Role	Electronic Processing Admin>Routing>Roles
Add Signature to a Role	Electronic Processing Admin>Routing>Roles>Signatures in Roles
Replace Signature in Role	Electronic Processing Admin>Routing>Roles>Replace Signature in Roles
Delete Signature in Role	Electronic Processing Admin>Routing>Roles>Signatures in Roles
View Organization Routing List	Electronic Processing Admin>Routing>Routing Lists
View Signatures in a Routing List	Electronic Processing Admin>Routing>Routing Lists>Signatures in Routing Lists
Add Role to Routing List	Electronic Processing Admin>Routing>Routing Lists>Signatures in Routing Lists
Delete Role from Routing List	Electronic Processing Admin>Routing>Routing Lists>Signatures in Routing Lists
Add a Traveler to a Group	Doc Prep Admin>Setup>Security>Groups>Group Members
Update a Traveler's Profile	Doc Prep Admin>Tables>Setup Tables> Traveler Information

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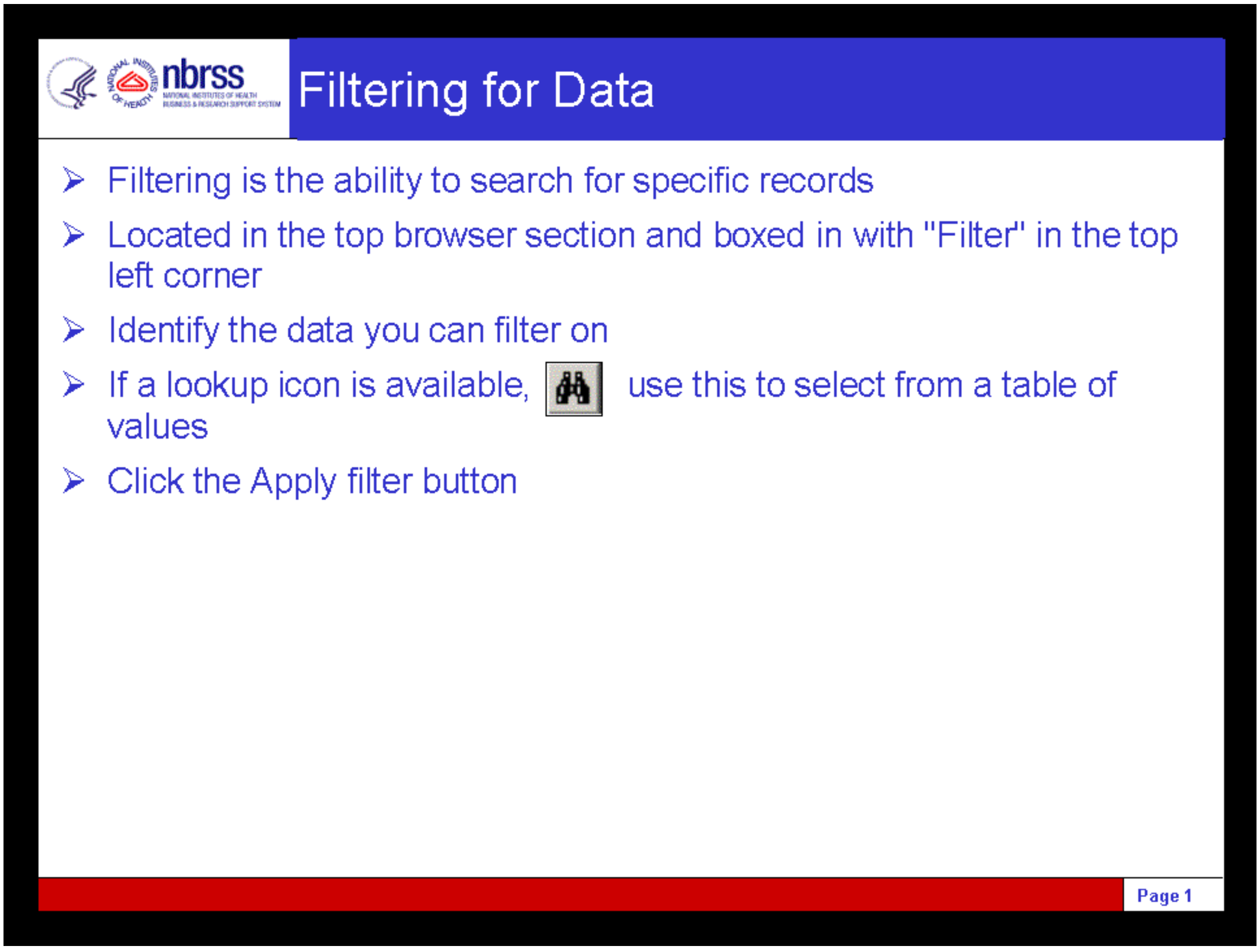
Filtering for Data

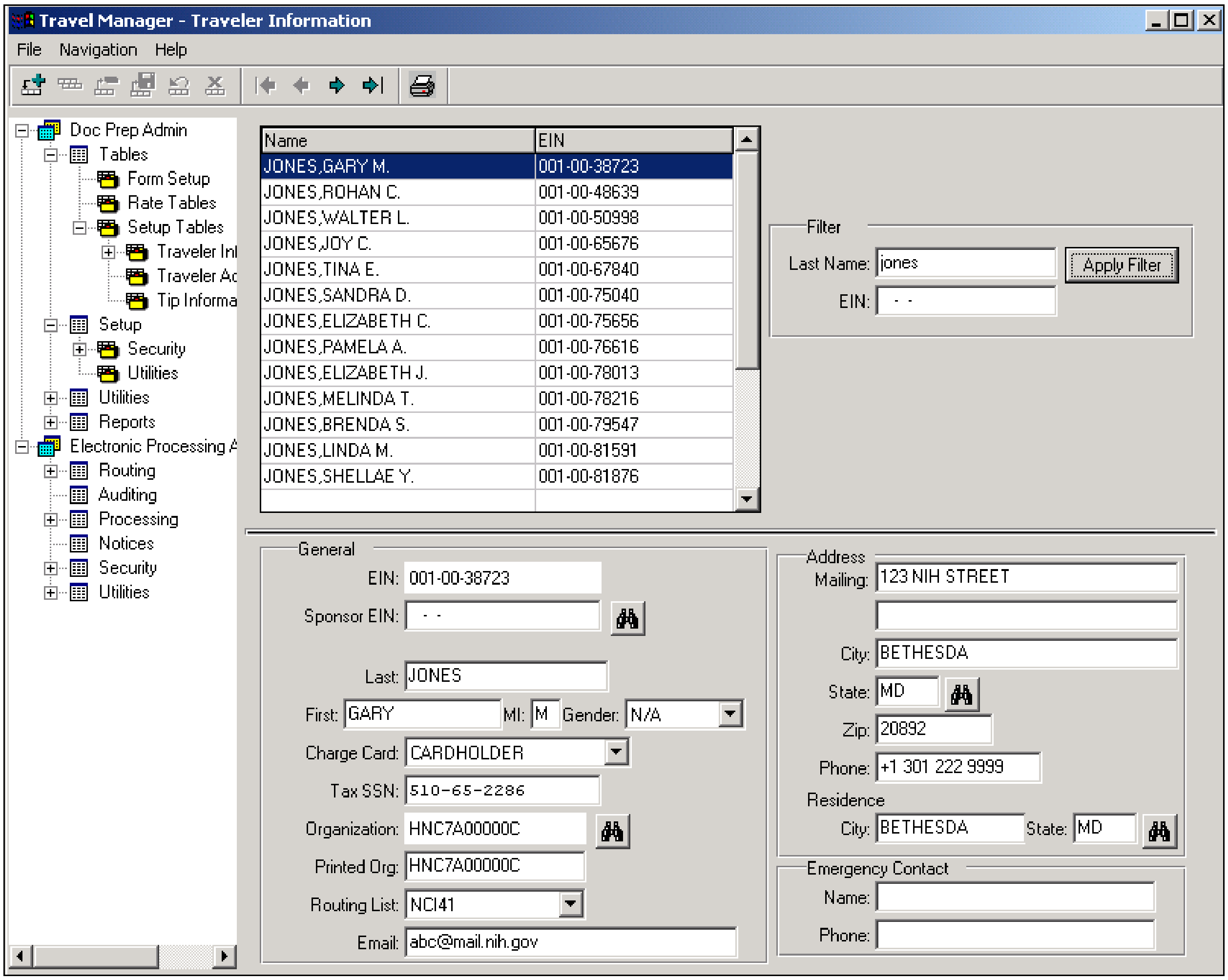


Using the Filter

Organization Administrator
N> Navigation Tree> Doc Prep Admin>Tables> Setup Tables>Traveler Information.
Travel Manager – Travel Information

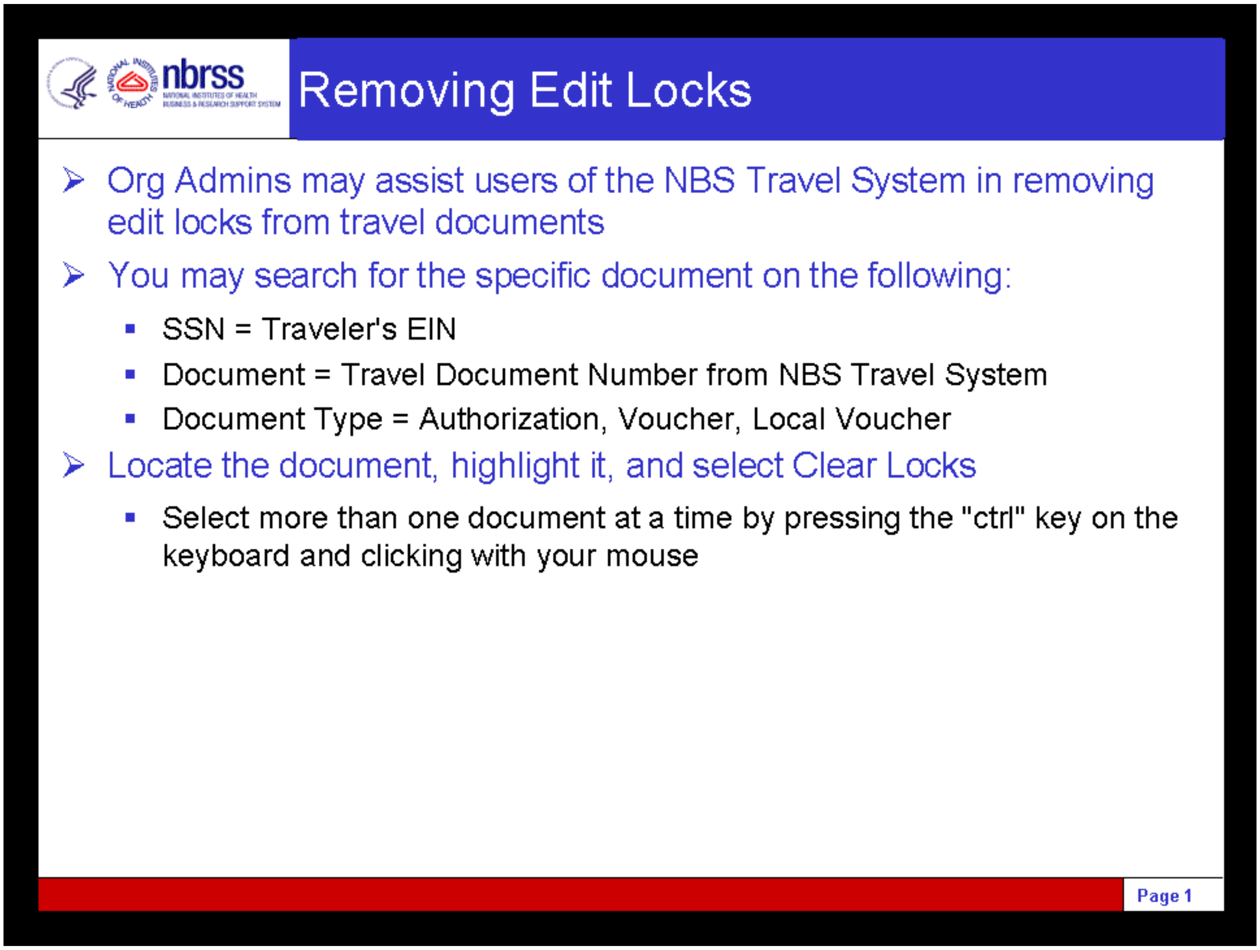
1. Enter the **Last Name** in the Last Name field and select the **APPLY FILTER** button.

   Result: Your screen should look similar to this.



End of activity.

Removing Edit Locks



Remove Edit Locks

Organization Administrator
N> Doc Prep Admin> Utilities>Document Utilities>Remove Edit-Locks
Remove Edit Locks

1. From the **Filter Area**, determine your filtering criteria and then select the **Apply Filter** button.

   Note: You may filter on any of the following criteria:

   SSN: This is the traveler's EIN.

   Document: enter the travel document number from the NBS Travel System

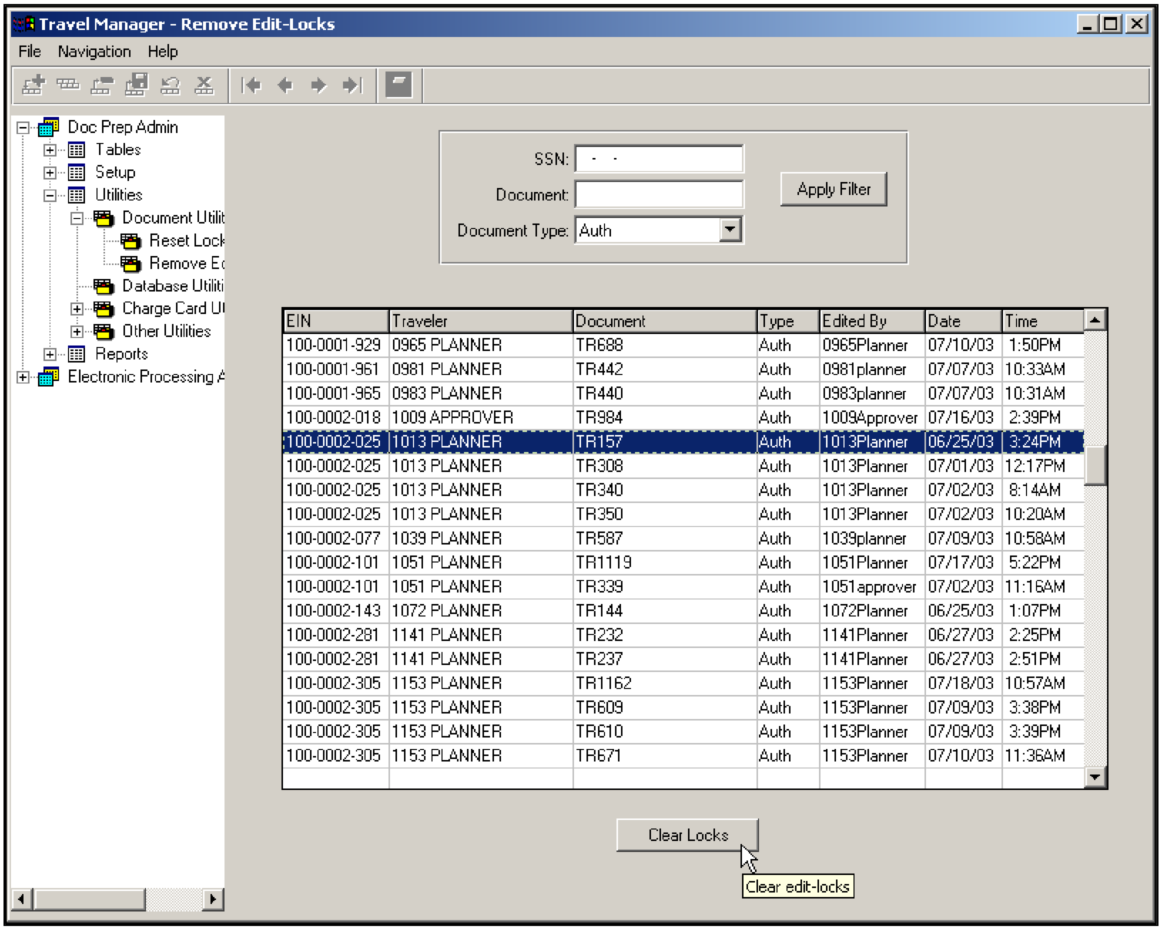
   Document Type: Chose between Auth (authorization), Voucher, or Local Voucher.

2. From the **Edit-Locked Document** table, select the row containing the document for which you wish to remove the edit lock. That row will turn blue.

   Note: Hold the Ctrl key to select multiple documents.

3. Select the **Clear Locks** button.

   Result: The Edit Lock is removed; the document will no longer be in View-Only mode, and is removed from the list of Edit Locked documents.



End of activity.

Manage Roles and Routing Lists

Chapter 3

Manage Roles and Routing Lists

February, 2004

Lesson Objectives

At the end of this lesson you should be able to manage the following:

- Roles - add and delete
- Signatures in a Role - add, delete and replace
- Routing list - add
- Role or Personnel (Signature) in a Routing List - add, delete and replace
- Routing List - edit

Page 2

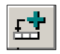
Roles

- Navigation path: Electronic Processing Admin> Routing> Roles
- Role is the title of the group that will receive a document during routing
  - Examples of role titles include:
    - AO Approver
    - Sponsor Dom Approver
    - SponForeign Approver
- Adding
  - Roles must be created prior to adding a signature (personnel) that can sign for it
  - Roles must be created prior to adding to a routing list
  - Assign Roles to the high-level Organization only (e.g., HNA, not HNA1)
- Deleting
  - To remove a role from the NBS Travel System entirely, select the role and then chose Delete Record

Page 3

Roles - Adding

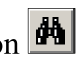
System Administrator N> Navigation Tree, select Electronic Processing Admin> Routing>Roles Roles

1. Select the Add Record icon. 

   Result: The cursor will automatically appear in the **Role Name** field in the middle of the screen.

   Note: Alternatively, you may select File>Add Record from the Menu Toolbar.

2. In the **Role Name** field, type a name for the role you wish to add.

3. Below the **Role Name** field, select the Lookup icon  to the right of the **Organization** field.

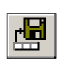
   Result: A separate lookup window will appear.

4. Scroll down to and select the desired Organization. The row will turn blue. Select the **OK** button.

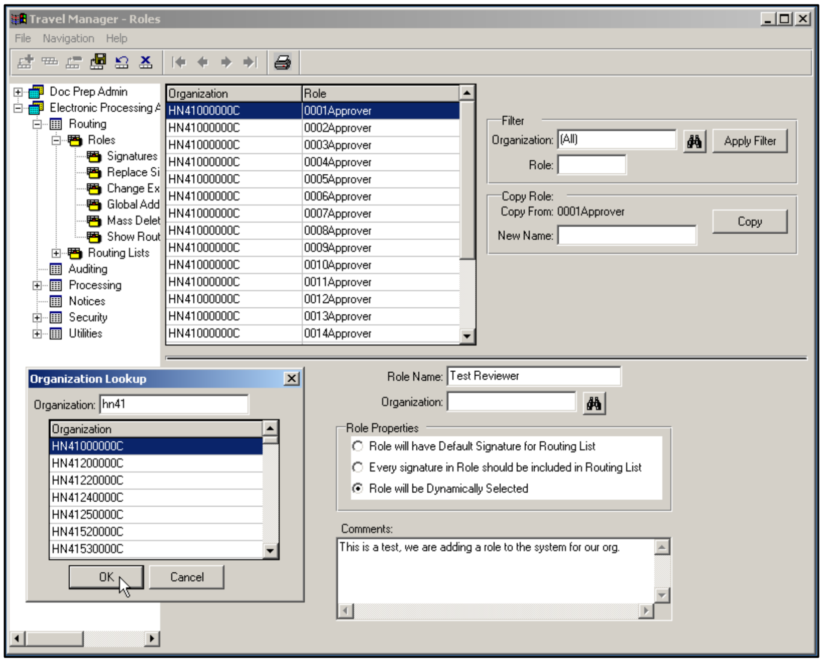
   Note: Watch the search results as you type the first few characters.

5. In the **Role Properties** box, make sure the selected button is "Role will be Dynamically Selected".

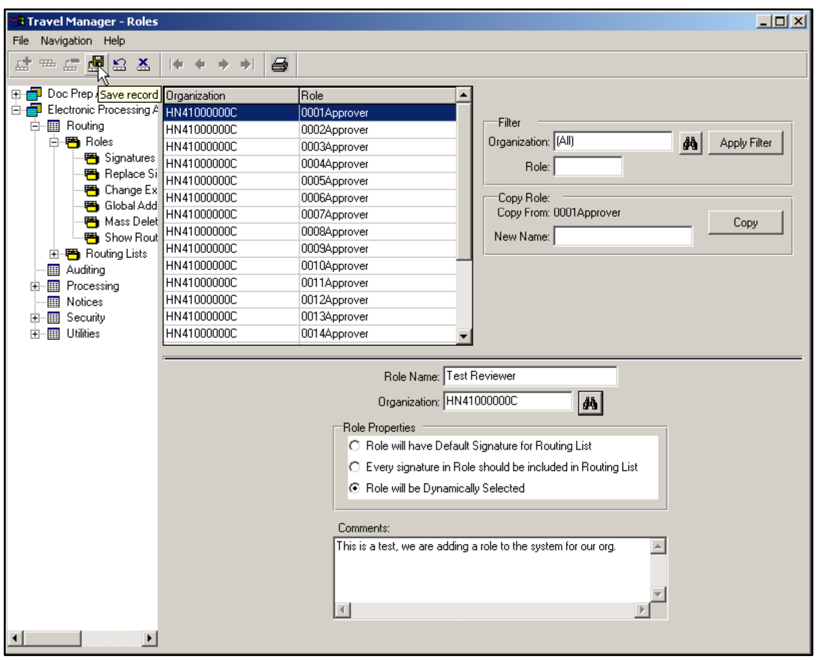
6. In the **Comments** box, you may type text that applies to this role.

7. Select the **Save Record** icon. 

   Note: Alternatively, you may select File>Save from the File Menu.



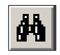
Electronic Processing Admin> Routing>Roles (con't)



End of activity.

Roles - Deleting

Organization Administrator
N> Electronic Processing Admin> Routing>Roles
Roles

1. From the Filter area, select the **Lookup** icon  to the right of the **Organization** field.

   Result: An Organization Lookup window will appear.

2. Scroll or search to locate **your** organization. Select the row that shows the Organization name.

   Result: That row will turn blue.

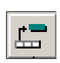
3. Select the **OK** button.

4. In the **Role** field, type the name (or first few characters) of the role you wish to delete and select the **Apply Filter** button.

   Result: The search results will appear in the Organization/Role Table.

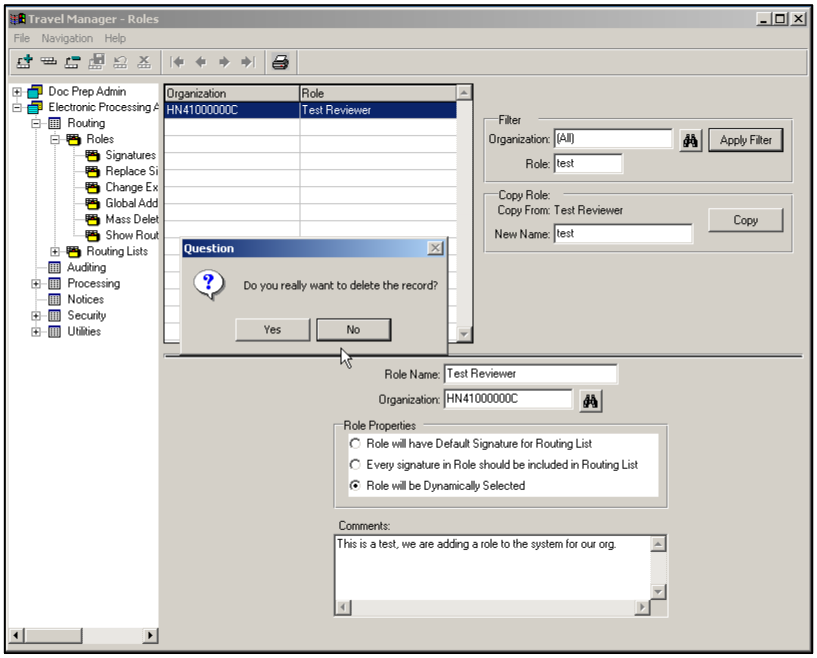
5. From the **Organization/Role** Table, select the desired role to be deleted.

   Result: That row will turn blue and the role's properties appears in the fields at the bottom half of the browser window.

6. Select the **Delete Record** icon. 

   Note: Alternatively, you may select File>Delete Record from the Menu Toolbar.

7. A modal (message) will appear, asking "Do you really want to delete the record?" Select the appropriate answer.



End of activity.

Signature in a Role

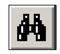
Signature in a Role

- Navigation path: Electronic Processing Admin> Routing> Roles> Signatures in a Role
- Identifies the personnel that may perform a a particular role
- Add:
  - Add personnel and assign an expiration date which indicates when they will no longer perform the role
- Delete:
  - Remove personnel by changing their expiration date
- Replace:
  - Replace personnel directly with another staff member

Page 4

Roles - Adding Personnel (Signatures)

Organization Administrator
N> Navigation Tree, select Electronic Processing Admin> Routing>Roles> Signatures
Signatures in Roles

1. In the Filter area, select the **Lookup** icon  to the right of the **Organization** field.

   Result: A separate lookup window will appear.

2. Scroll down to and select **your** desired Organization. The row will turn blue. Select the **OK** button.

3. In the **Filter** area, enter the Role name in the **Role** field, and select the **Apply Filter** button.

   Result: The Organization/Role table will populate with the results.

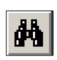
4. In the **Organization/Role** table, select the desired Organization and Role.

   Result: The EIN/Name table below populates with all the signatures in that role (if any).

5. Select the Add Record icon. 

   Result: The cursor will automatically appear in the Signature Name field and the Effective date will populate with today's date.

   Note: Alternatively, you may select File>Add Record from the Menu Toolbar.

6. Select the **Lookup** icon  to the right of the Signature Name field to search through a list for the person's name that you want to add to this Role.

   Result: A separate Signature Lookup window will appear.

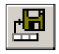
7. Use the filter and search (usually by last name) for and select the desired name; the row will turn blue. Select the OK button.

   Result: The person's Name populates the Signature Name field.

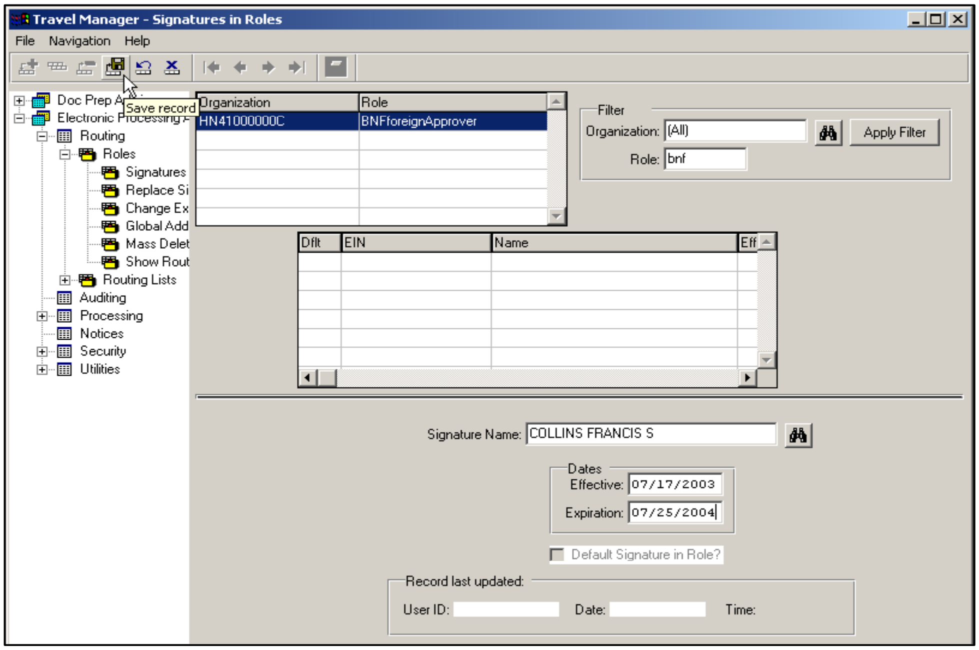
   Note: If the person is listed twice with two different EINs, select the EIN that is fully numeric.

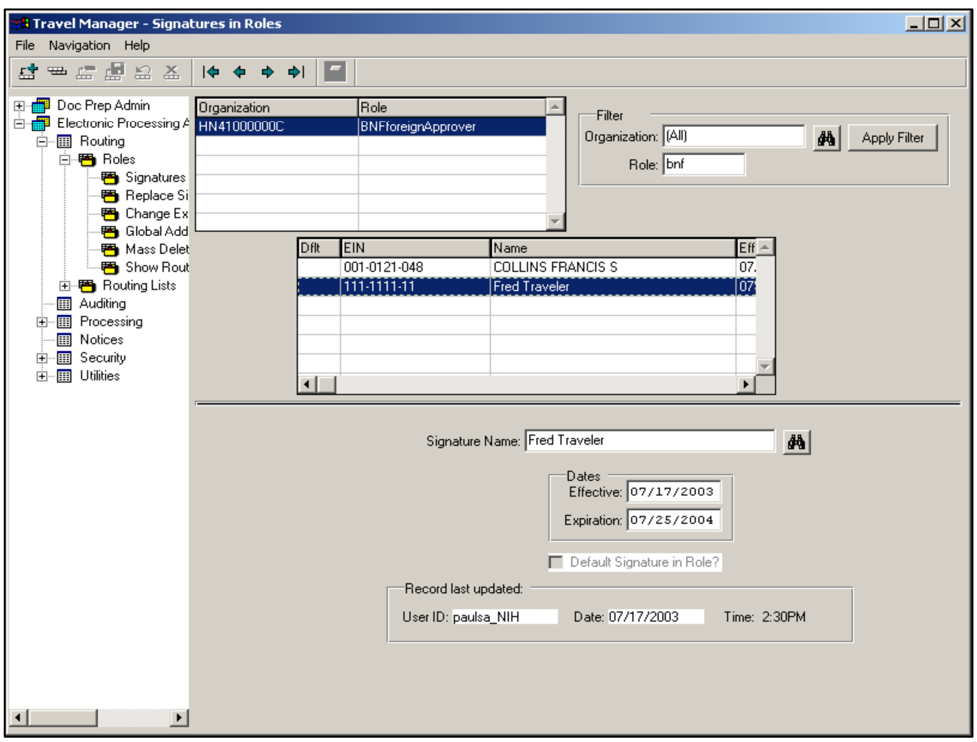
8. Select inside the Expiration field and enter an expiration date

   Note: The Expiration date is the date the signature record expires for this role. After this date, the signature is no longer displayed in the NBS Travel System for this role.

9. Select the **Save Record** icon. 

<u>Note:</u> Alternatively, you may select File>Save from the File Menu.



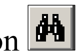


10. Optionally repeat steps above for each person you want to add to that Role.

End of activity.

Roles - Deleting Personnel (Signature)

Organization Administrator
N> Electronic Processing Admin>Routing> Roles>Signatures
Signatures in Roles

1. From the Filter area, select the **Lookup** icon  to the right of the **Organization** field.

   Result: A separate lookup window will appear.

2. Scroll down to and select the desired Organization. Select the **OK** button.

3. From the **Filter** area, enter the desired role in the **Role** field, and select the **Apply Filter** button.

   Result: The Organization/Role table will populate with the results.

4. In the **Organization/Role** table, select the desired **Organization** and **Role**.

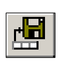
   Result: The EIN/Name table below populates with all the signatures in that role.

5. From the EIN/Name table, select the name to be deleted.

   Result: The row will turn blue, and that Name's information will populate the browser on the bottom half of the screen.

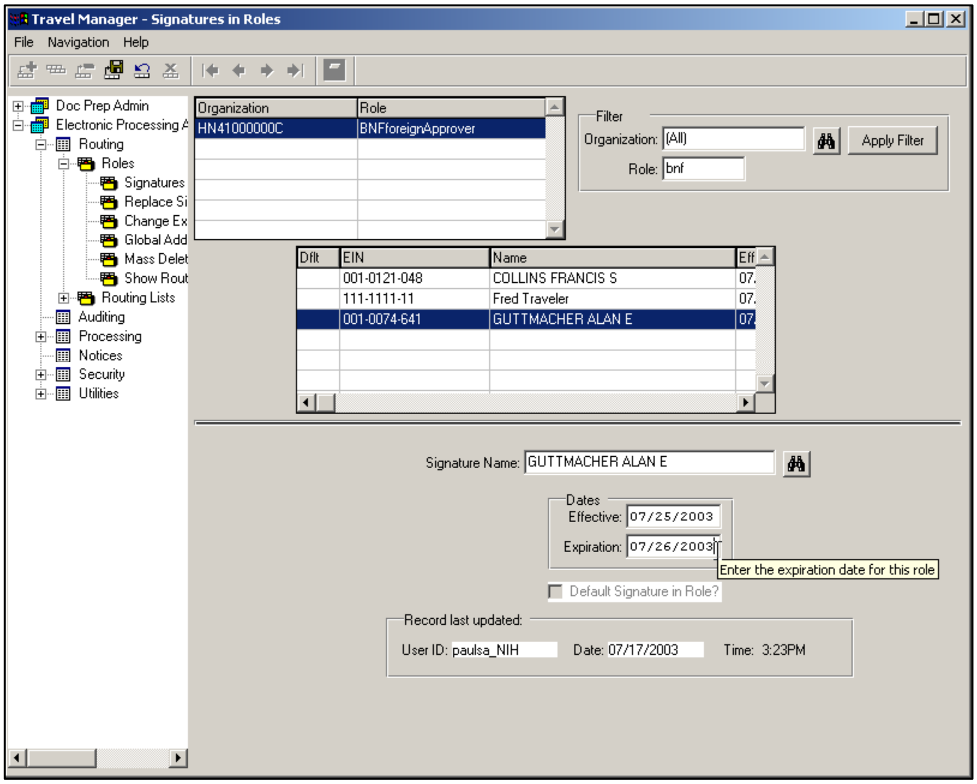
6. In the **Expiration** field, set the date you want that Signature Name to expire from that Role.

   Note: The signature will no longer be displayed on the role in the NBS Travel System after that date once you save the record.

7. Select the **Save Record** icon. 

   Note: Alternatively, you may select File>Save from the File Menu.

   Note2: Be sure to 'Save Record' after making changes to each record; otherwise the changes will not be saved.



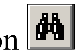
End of activity.

Roles - Replacing Personnel (Signature)

Organization Administrator

N> Navigation Tree, select Electronic Processing Admin> Routing>Roles> Replace Signature in Roles

Replace Signatures in Roles

1. In the **Previous Signature** section, select the **Lookup** icon  to the right of the **EIN** field.

   Result: A separate **Signature Lookup** window will appear.

2. In the **Organization/Signature Name** list, search for and select the name of the existing signature record that needs to be replaced.

   Result: The row will turn blue.

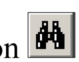
3. Select the **OK** button.

   Result: The EIN, Name, and Exp Date fields are populated with the Employee Identification Number, Name on the signature record, and the expiration date for the signature.

4. Select the **Show Roles** button. All Roles that contain the signature record are listed in the browser in the Organization and Role columns.

   Note: If the signature you selected is not in any Roles, a modal (message) will appear to let you know.

5. Select the desired roles for which you want the signature replacement to occur.

6. In the **Replace with Signature** section, select the **Lookup** icon  to the right of the EIN field.

   Result: A separate **Signature Lookup** window will appear.

7. In the **Organization/Signature Name** list, search for and select the row containing the name and EIN of the signature record that will replace the previous signature.

   Result: The row will turn blue.

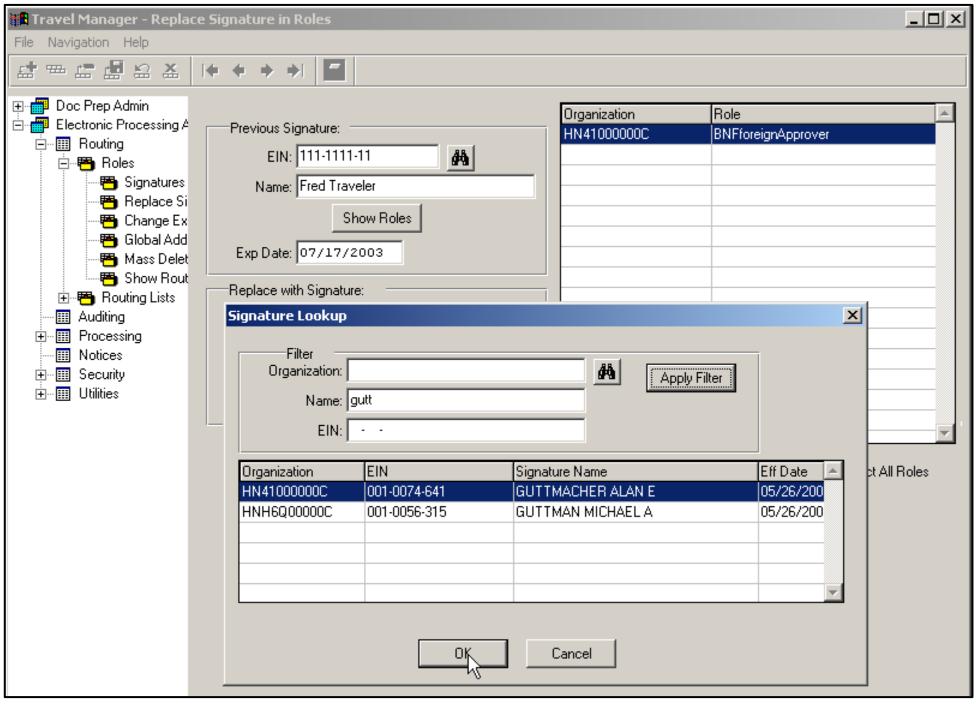
8. Select the **OK** button.

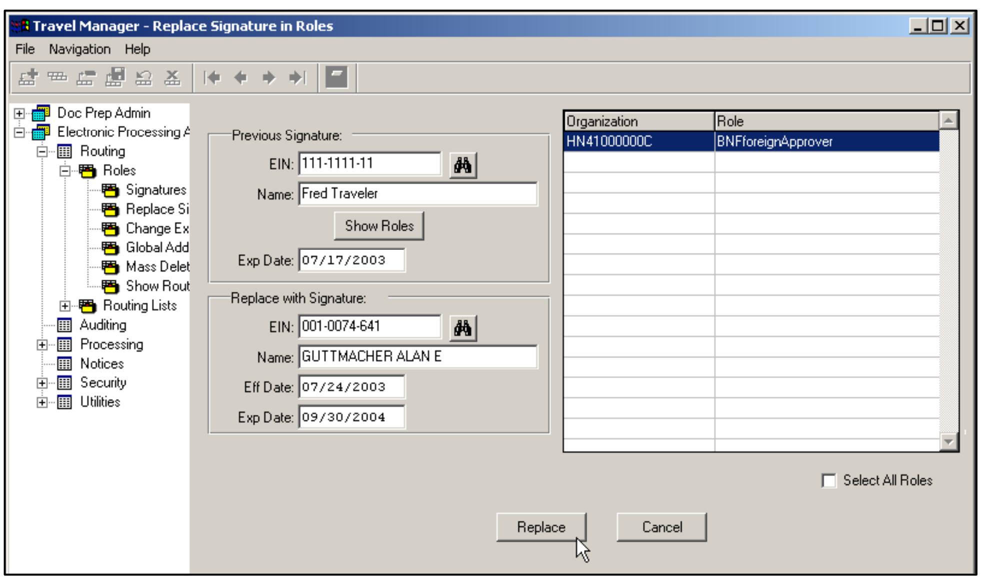
   Result: The EIN and Name fields are populated with the new Employee Identification Number and Name on the signature record.

9. Select inside the **Eff Date** and **Exp Date** fields, and enter an effective date (the date you perform this action) and an expiration date (for the new signature in the role).

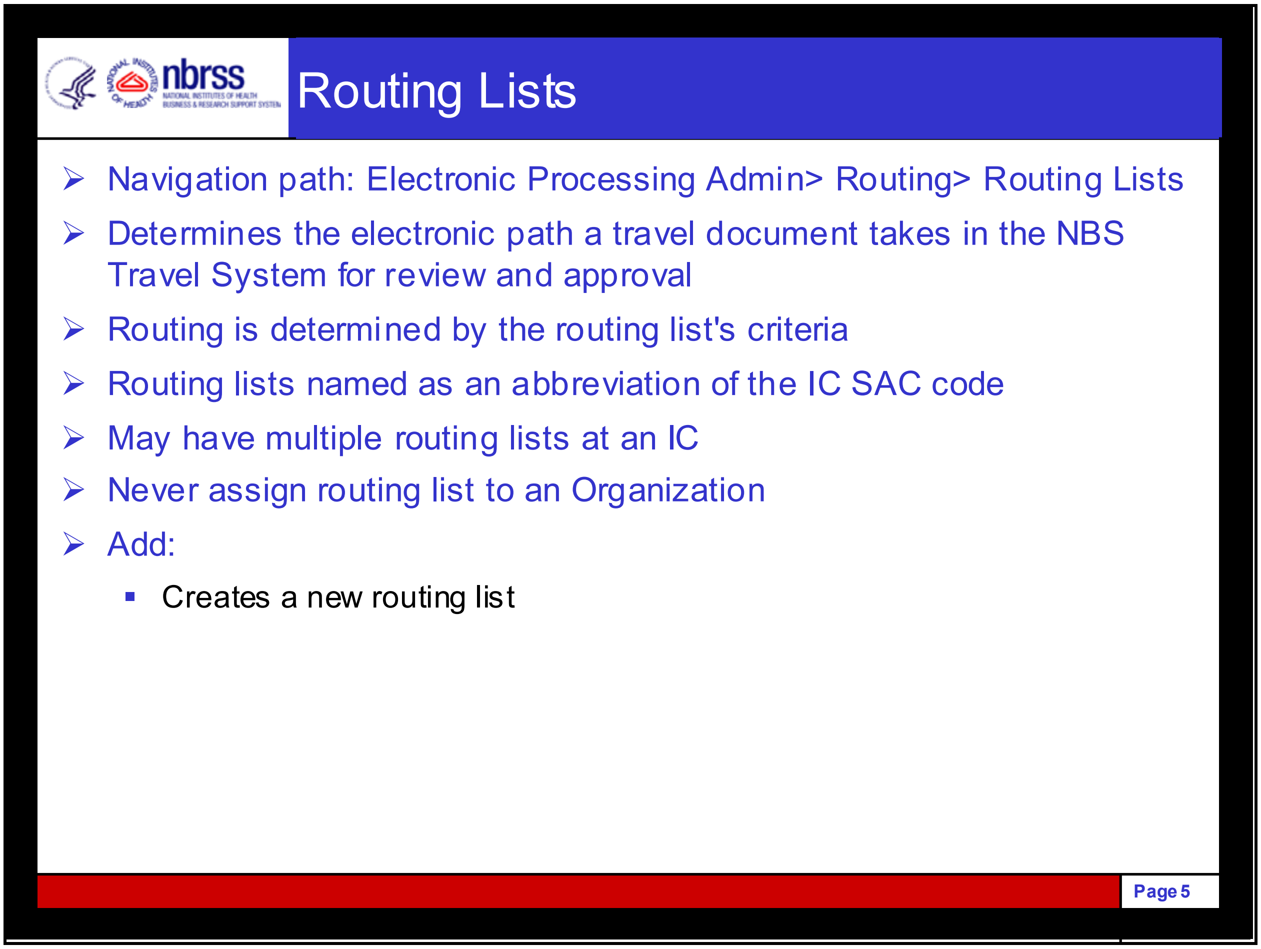
10. Select the **Replace** button.

Note: You will NOT be prompted with a message asking you to confirm that you want to replace, so **be certain you have the correct intended** role, existing name, and replacement name **before** selecting the REPLACE button.





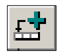
End of activity.


nbrss
NATIONAL INSTITUTES OF HEALTH
BUSINESS & RESEARCH SUPPORT SYSTEM
Routing Lists
Navigation path: Electronic Processing Admin> Routing> Routing Lists
Determines the electronic path a travel document takes in the NBS Travel System for review and approval
Routing is determined by the routing list's criteria
Routing lists named as an abbreviation of the IC SAC code
May have multiple routing lists at an IC
Never assign routing list to an Organization
Add:
Creates a new routing list
Page 5

Routing Lists - Adding

Organization Administrator
N> Navigation Tree> Electronic Processing Admin>Routing>Routing Lists.
Routing Lists utility

Note: You can select an Organization (SAC)/Group Name here, and it will be the default Organization/Group Name when you subsequently select a utility that is within the Routing Lists utility (e.g., Signatures in Routing List or Replace Signature).

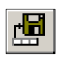
1. Select the **Add Record** icon. 

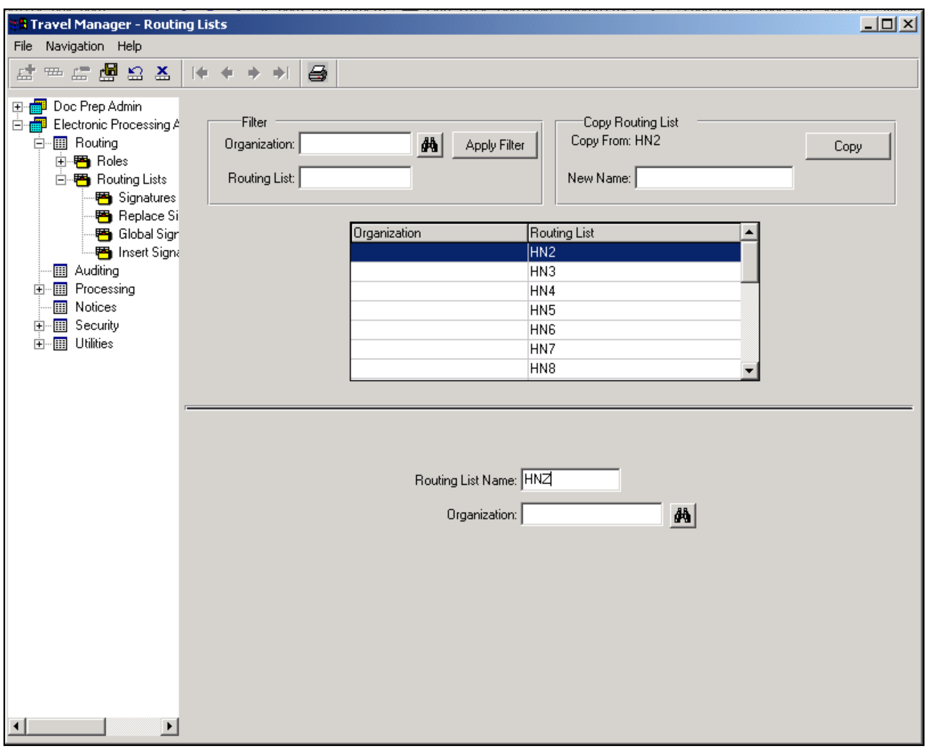
2. In the **Routing List Name** field, enter the name of the routing list.

   Note: At the NIH the routing lists are generally named as an abbreviation of a SAC code.

3. Leave the **Organization** field blank.

   Note: Routing lists should not be assigned to a specific organization.

4. Select the **Save Record** icon. 



End of activity.

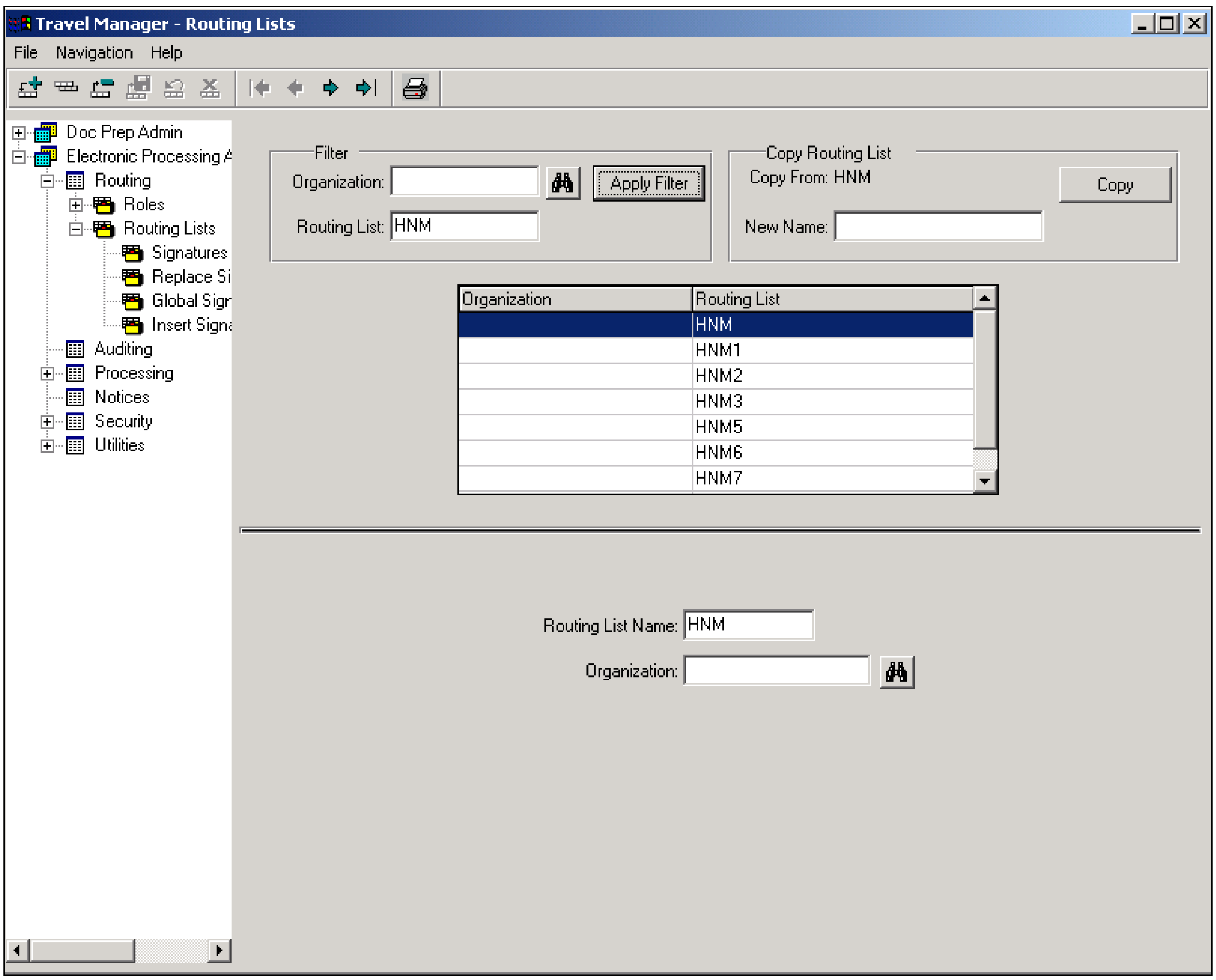
Routing Lists - Viewing

Organization Administrator
N> Navigation Tree, select Electronic Processing Admin>Routing>Routing Lists
Routing Lists

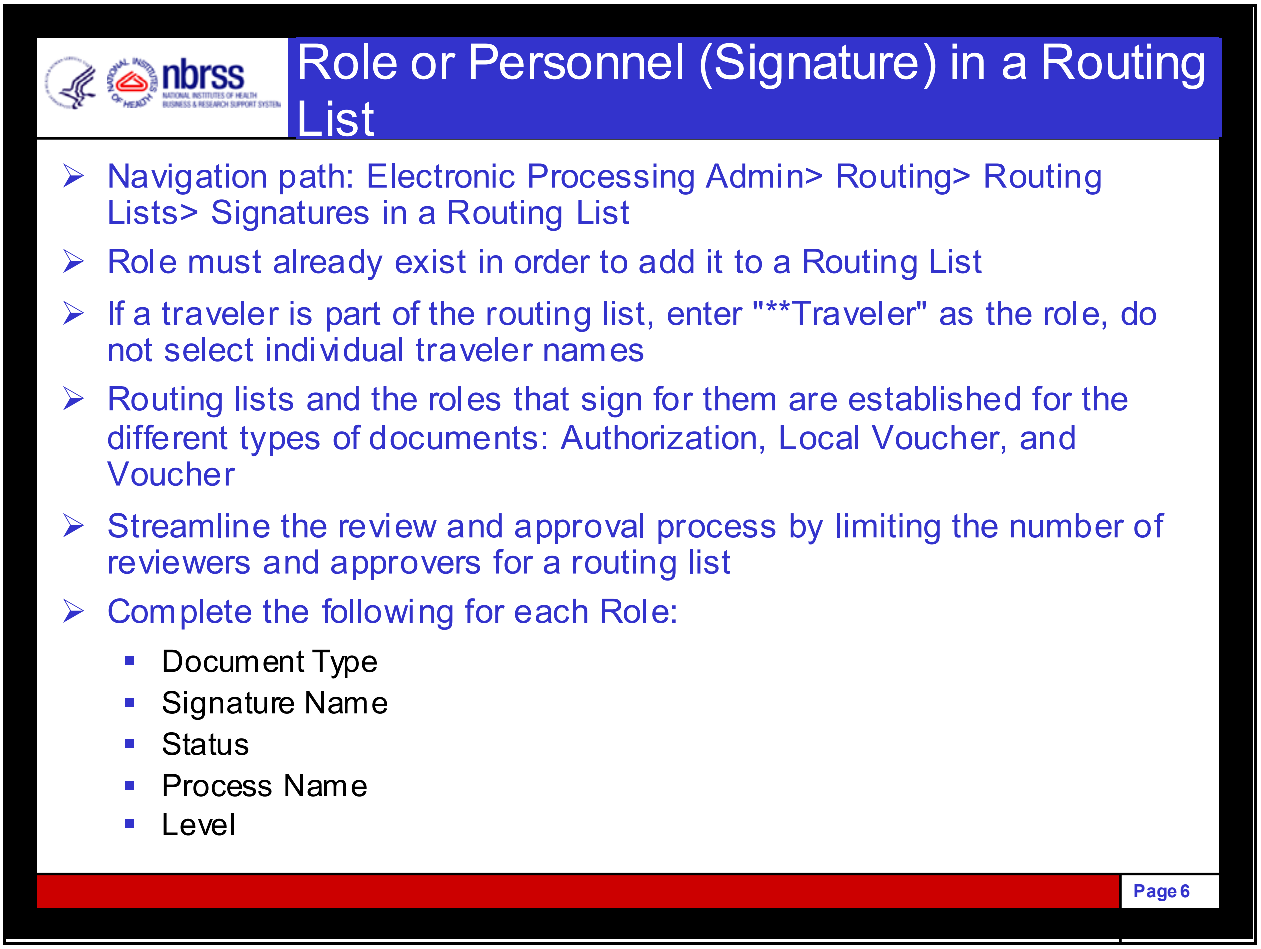
Note: You can select an Organization (SAC)/Group Name here, and it will be the default Organization/Group Name when you subsequently select a utility that is within the Routing Lists utility (e.g., Signatures in Routing List or Replace Signature).

1. From the **Filter** area, enter the desired routing list name in the **Routing List** field and select the **Apply Filter** button.

   Result: The routing list appears in the window below.



End of activity.



When adding Roles or Personnel to the routing list, you must complete the following fields:

•Document Type: select from the pull down menu between Authorization, Local Voucher, and Voucher

•Signature Name: it is advised to use the ROLE button to lookup a previously created role. Using the signature button selects a specific individual.

•Status: Assign a default status to apply for each of the roles. For Reviews assign Reviewed; for Travelers assign Certified; for all Approvers assign Conditional Approval. Each Role may change the status when actually signing the travel document.

•Process name: the criteria that must be met in order for the document to route to the role in the routing list. If the role is to receive all documents regardless of the conditions that exist leave the process name field blank.

•Level: defines the order in which a document will route to the different roles.

Routing Lists - Adding a Role

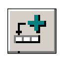
Organization Administrator
N> Navigation Tree> Electronic Processing Admin>Routing>Routing Lists>Signatures
Signatures in Routing List utility

1. Enter the desired routing list name in the routing list field. Leave the **Organization** field blank. Select the **Apply Filter** button.

2. From the Routing browser, Organization/Routing List, select the routing list to which you want to assign the signature record or role record.

   Result: The row will turn blue.

   Note: You may select a Routing List from the browser in the Routing Lists utility (one level up in the hierarchy from Signatures in Routing List). That Routing List will then default into the Routing browser when you access the Signatures in Routing List utility. Accordingly, the routing list information for the selected Routing List is displayed.

3. Select the **Add Record** icon. 

   Note: Alternatively, you may select File>Add Record from the Menu Toolbar.

4. From the **Document Type** field drop-down list, select the document type for which this role will be available (Authorizations, Vouchers, or Local Vouchers).

   Note: If you want the role to be available for more than one document type, you will have to add that role for each document type.

5. To the right of the **Signature Name** field, select the **Role** button.

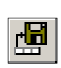
   Result: A Role Name Lookup window will appear.

6. Search for and select the desired role record to be added, and then select the **OK** button.

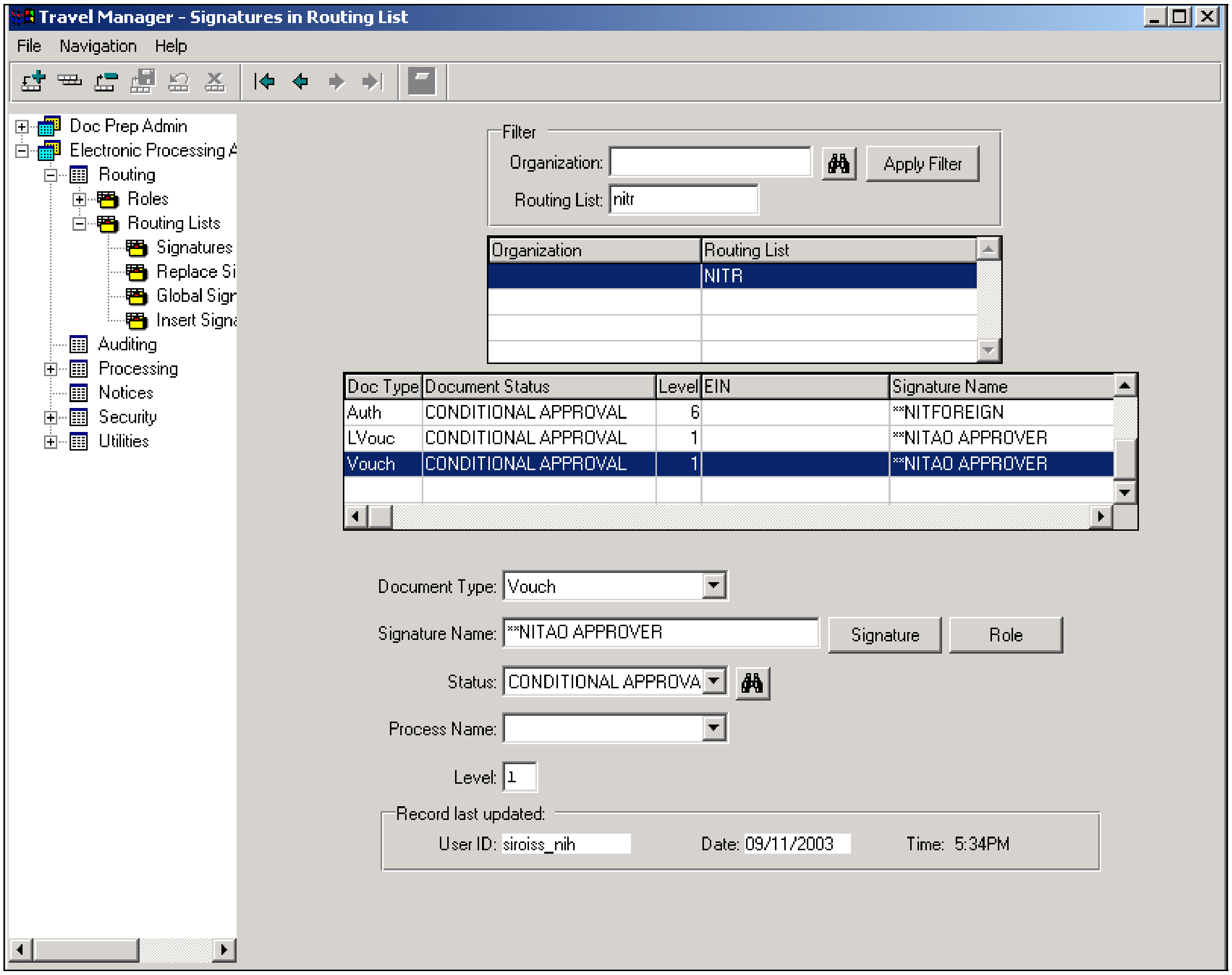
   Result: The role record is displayed in the **Signature Name** field. Make sure all the desired signature name choices for that role are active.

7. Fill in the fields that do not automatically populate with their appropriate values for the signature or role that you are adding (e.g., Status, Process Name, Level).

   Note: The default status for all Approvers should be set to “Conditional Approval” and for all Reviewers, set it to “Reviewed.”

8. Select the **Save Record** icon. 

   Note: Alternatively, you may select File>Save from the Menu Toolbar.



9. To add the additional roles for each travel circumstance, simply repeat above steps.

   Note: Remember: When setting up a new routing list, the role **Traveler must be manually typed into the signature name box for each type of travel document.

End of activity.

Routing Lists - Adding a Signature Name

Before you Begin

SINCE THE NIH IS ENCOURAGING USING ROLES IN THE NBS TRAVEL SYSTEM ROUTING LISTS, THIS FEATURE MOST LIKELY WILL NOT BE USED FREQUENTLY.

Organization Administrator
N> Navigation Tree>Electronic Processing Admin>Routing>Routing Lists>Signatures in Routing List
Signatures in Routing List utility

1. Enter the desired routing list name in the **routing list** field. Leave the **Organization** field blank. Select the **Apply Filter** button.

2. From the **Routing** browser, **Organization/Routing List**, select the routing list to which you want to assign the signature record or role record.

   Result: The row will turn blue.

3. Select the **Add Record** icon. 

   Note: Alternatively, you may select File>Add Record from the Menu Toolbar.

4. From the **Document Type** field drop-down list, select the document type for which this role will be available (Authorizations, Vouchers, or Local Vouchers).

   Note: If you want the role to be available for more than one document type, you will have to add that role for each document type.

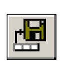
5. To the right of the **Signature Name** field, select the **Signature** button

6. Select the desired person to be added, and then select the **OK** button.

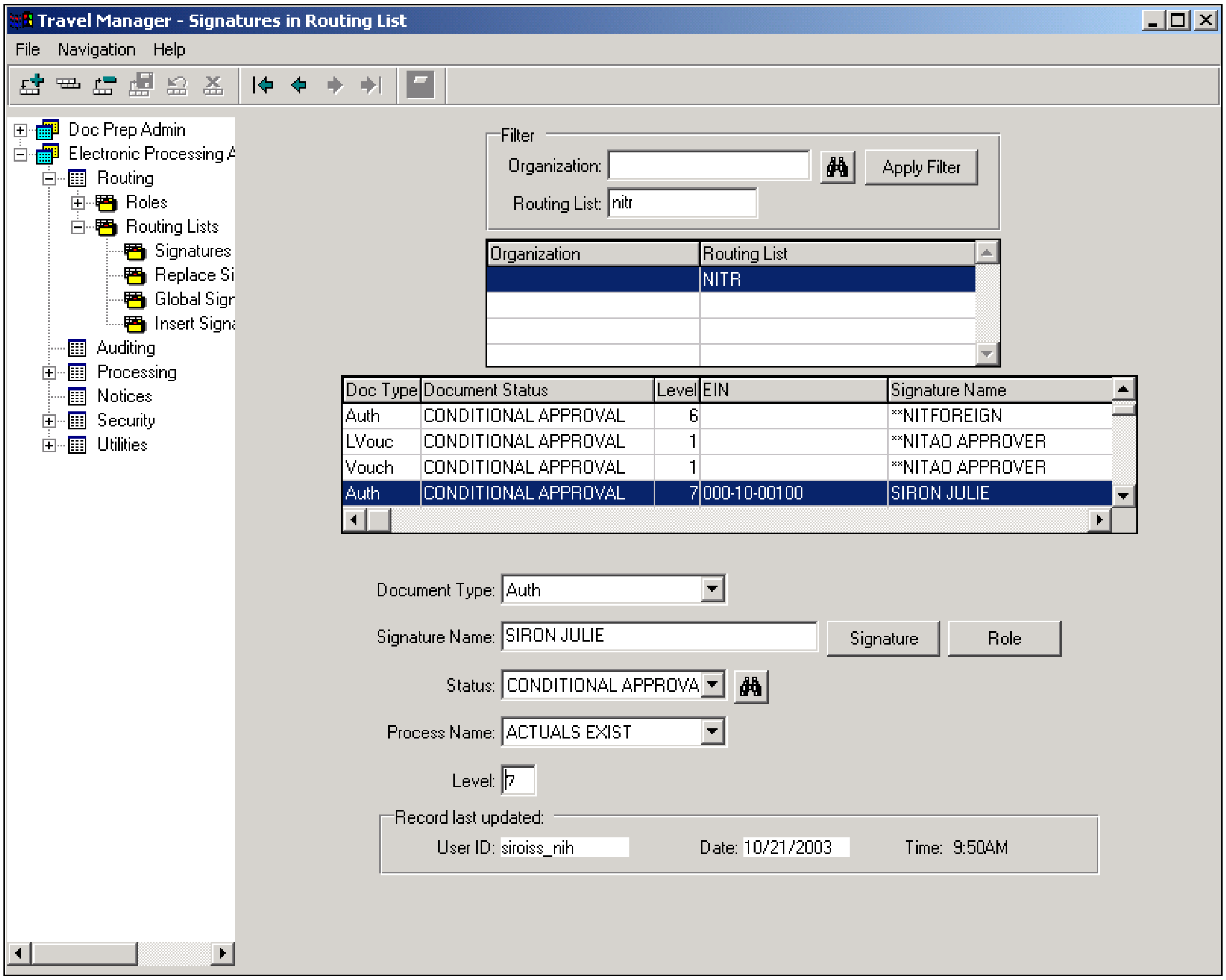
   Result: The person's name is displayed in the **Signature Name** field.

   Note: Make sure all the desired signature name choices for that role are active.

7. Fill in the fields that do not automatically populate with their appropriate values for the signature or role that you are adding (e.g., Status, Process Name, Level).

8. Select the **Save Record** icon. 

   Note: Alternatively, you may select File>Save from the Menu Toolbar.



9. If you want to add multiple signatures or roles to a particular routing list, simply repeat above steps.

End of activity.

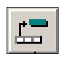
Routing Lists - Deleting a Role or Person (Signature Name)

Organization Administrator
N> Navigation Tree> Electronic Processing Admin>Routing>Routing Lists>Signatures in Routing List
Signatures in Routing Lists utility

1. In the **Filter** area, enter the desired routing list name in the **Routing List** field and select the **Apply Filter** button.

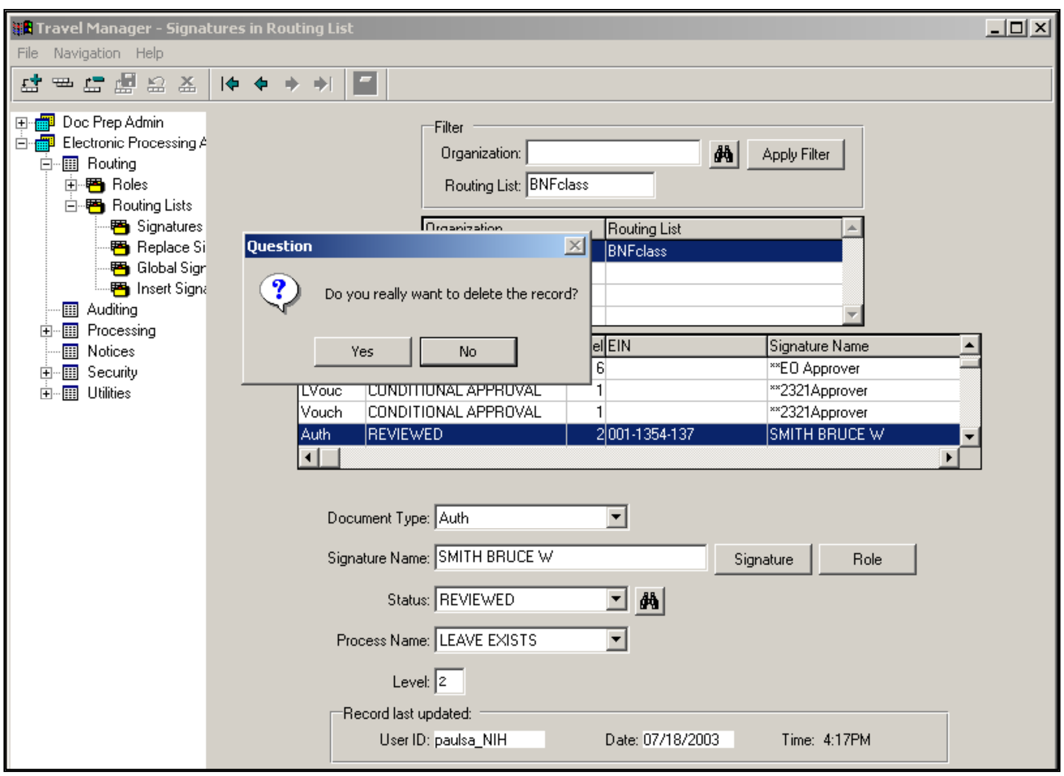
2. From the **Routing List Detail** Table, select the role or signature to be deleted.

   Result: The row will turn blue.

3. Select the **Delete Record** icon. 

   Note: Alternatively, you may select File>Delete Record from the Menu Toolbar.

4. A modal (message) will ask, “Do you really want to delete this record?” Select the appropriate answer.



End of activity.

Routing List - Editing

Routing List - Editing

- Organization Administrators will most likely edit existing routing lists
- Activities are primarily focused on adding and deleting roles in the routing lists
- Any routing list changes affect only newly created travel documents after the edit

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Routing Lists - Editing

Organization Administrator
N> Navigation Tree, Electronic Processing Admin>Routing>Routing Lists>Signatures in Routing List
Signatures in Routing Lists utility

1. In the **Filter** area, enter the desired routing list name in the **Routing List** field and select the **Apply Filter** button.

2. Compare the existing routing list to the desired routing list. Identify all changes that must be made to current routing list.

If adding a new role, goto task #3. Otherwise, goto task #6.

3. Edit the levels of existing routing list to allow for gaps in which to add new roles at the appropriate levels:

   - Highlight the row of the level to edit in the **Signatures in a Routing List** screen.
   - Change the information on the lower half of the screen.
   - Select the **Save Record** icon to save your changes.

4. Add new roles to the routing list, as necessary.

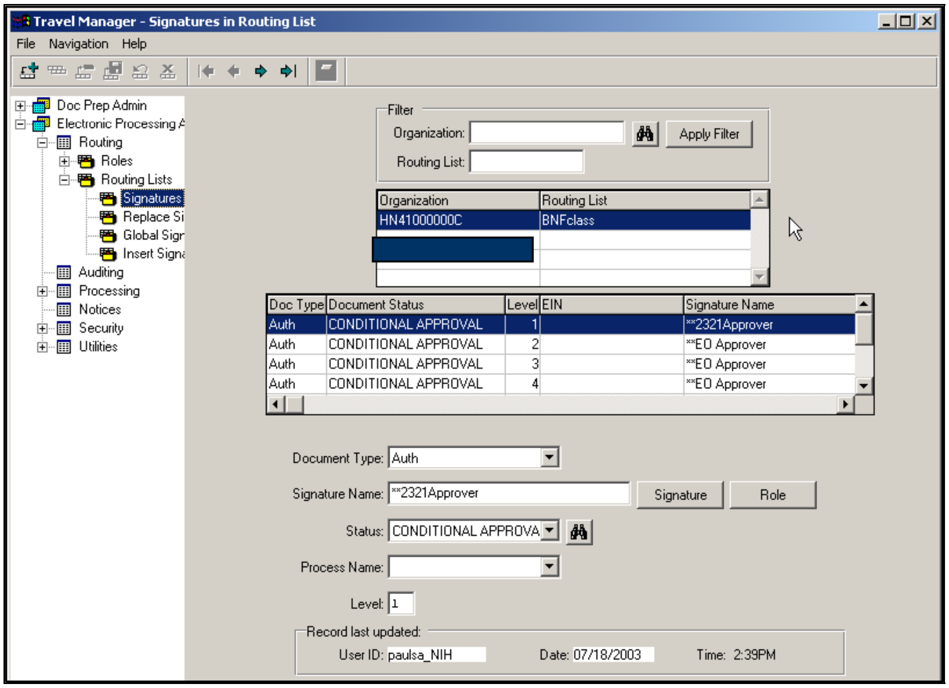
   Note: Before you can add a role to the routing list, the role must already exist. If you need to create a new role, go to Electronic Processing Admin>Routing>Routing Lists>Roles.

5. Click the **Save Record** icon.

End of activity.

6. Delete roles on the routing list as necessary.

   - Highlight the role to delete.
   - Select the Delete Record icon.



End of activity.

Checklist to Edit Existing Roles

- ❑ Compare existing Roles and to desired Roles
- ❑ Create new Roles, if necessary.
  - (*Electronic Processing Admin>Routing>Roles*)
- ❑ Add/Edit Signatures to Roles.
  - (*Electronic Processing Admin>Routing>Roles>Signature in Role*)
- ❑ Add newly created Roles to Routing List (use the Routing List worksheet, if necessary).
  - (*Electronic Processing Admin>Routing>Routing List>Signature in a Routing List*)

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Checklist to edit existing Routing Lists

Checklist to edit existing Routing Lists

- ❑ Compare existing routing list to desired routing list
- ❑ Add new roles, if necessary. (Use the Roles Worksheet, if needed.)
  - (*Electronic Processing Admin>Routing>Roles*)
- ❑ Add signatures to roles, if necessary. (Use the Roles Worksheet, if needed.)
  - (*Electronic Processing Admin>Routing>Roles>Signature in Role*)
- ❑ Edit levels of existing routing list to allow for gaps in which to add new roles at the appropriate levels.
  - (*Electronic Processing Admin>Routing>Routing List>Signature in a Routing List*)
- ❑ Add new roles to Routing List.
  - (*Electronic Processing Admin>Routing>Routing List>Signature in a Routing List*)

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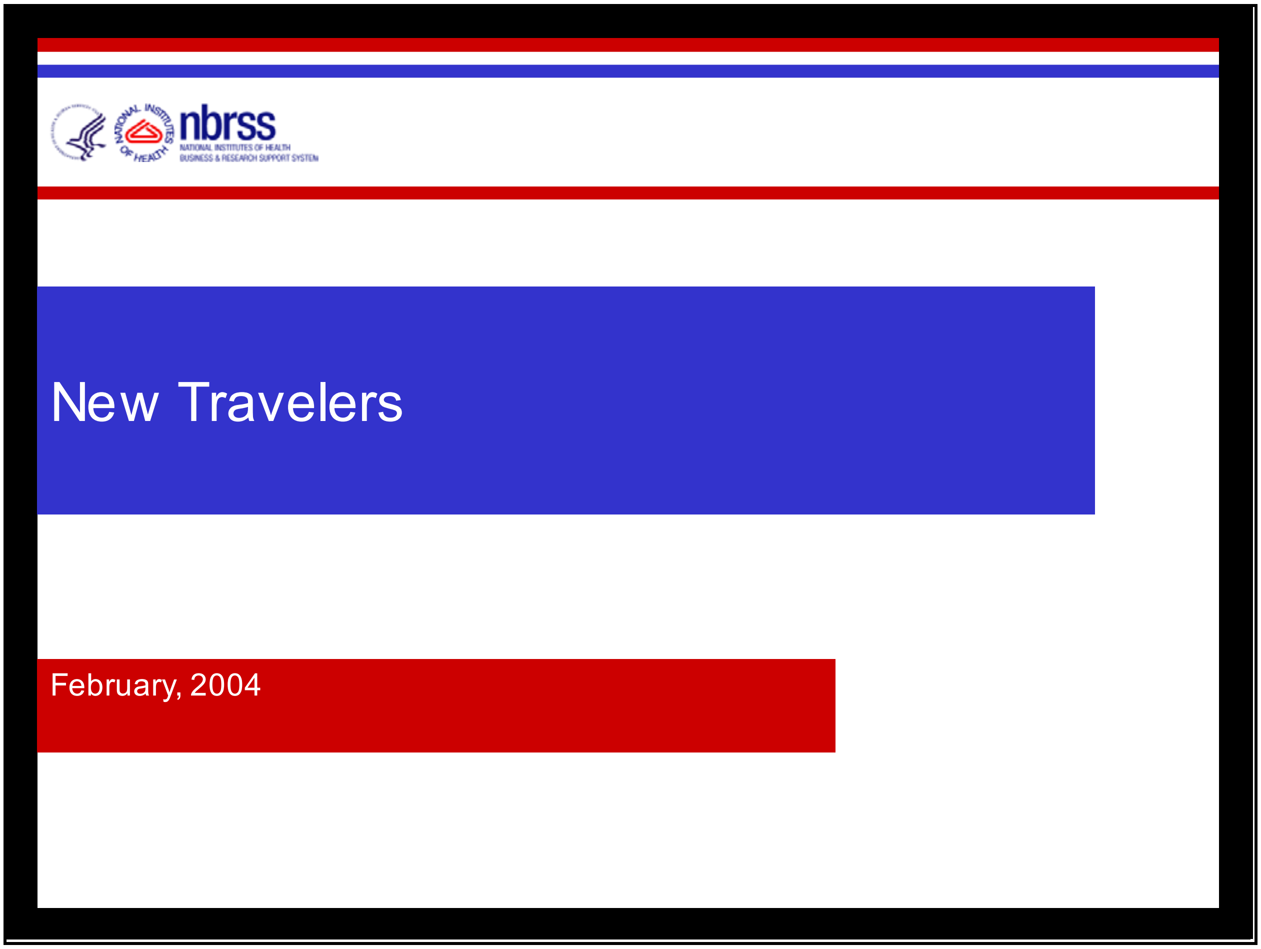
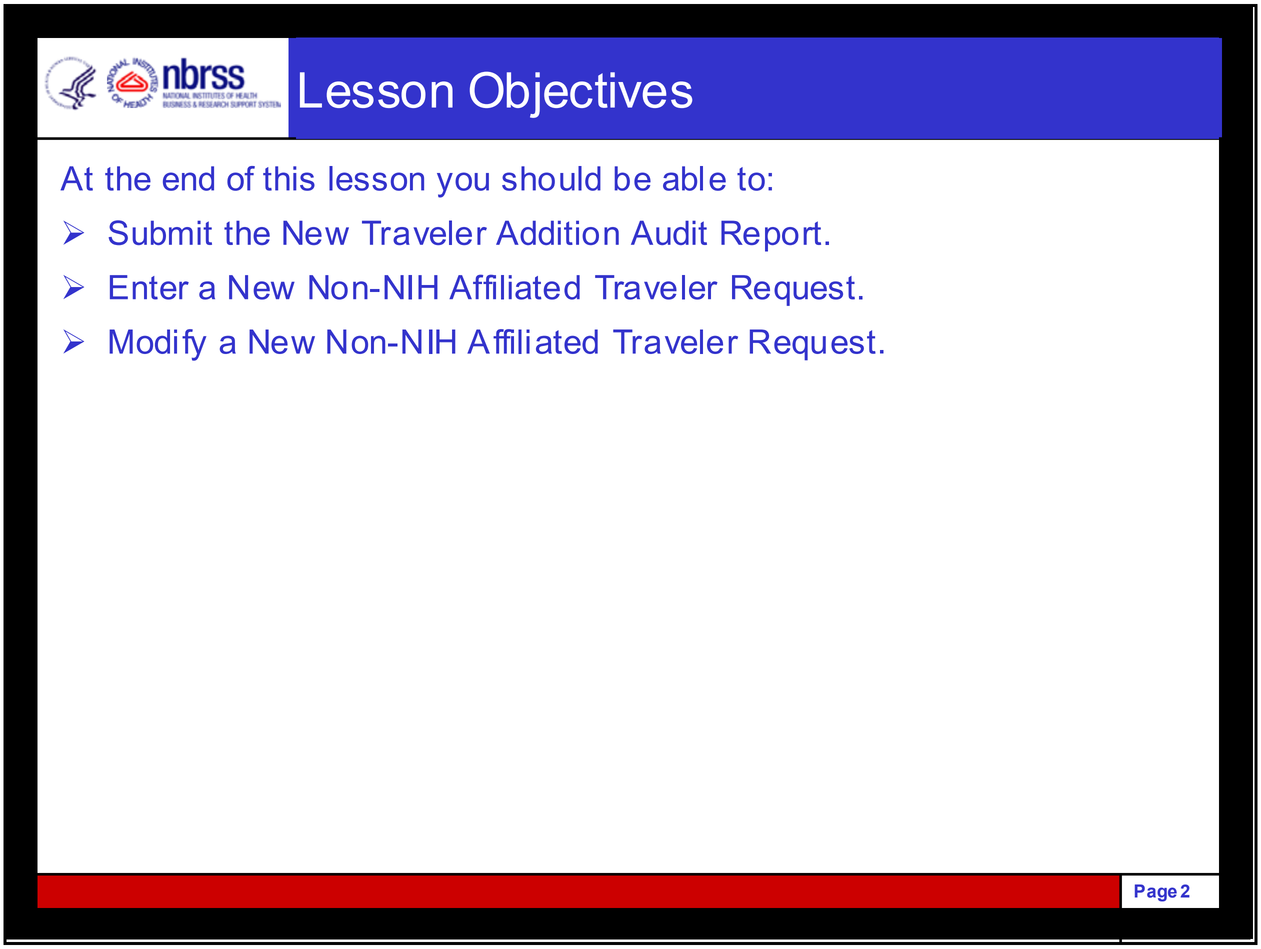
New Travelers

Chapter 4


nbrss
NATIONAL INSTITUTES OF HEALTH
BUSINESS & RESEARCH SUPPORT SYSTEM
New Travelers
February, 2004

Lesson Objectives



Adding Travelers to the NBS Travel System

Accessing Oracle via the NIH Portal

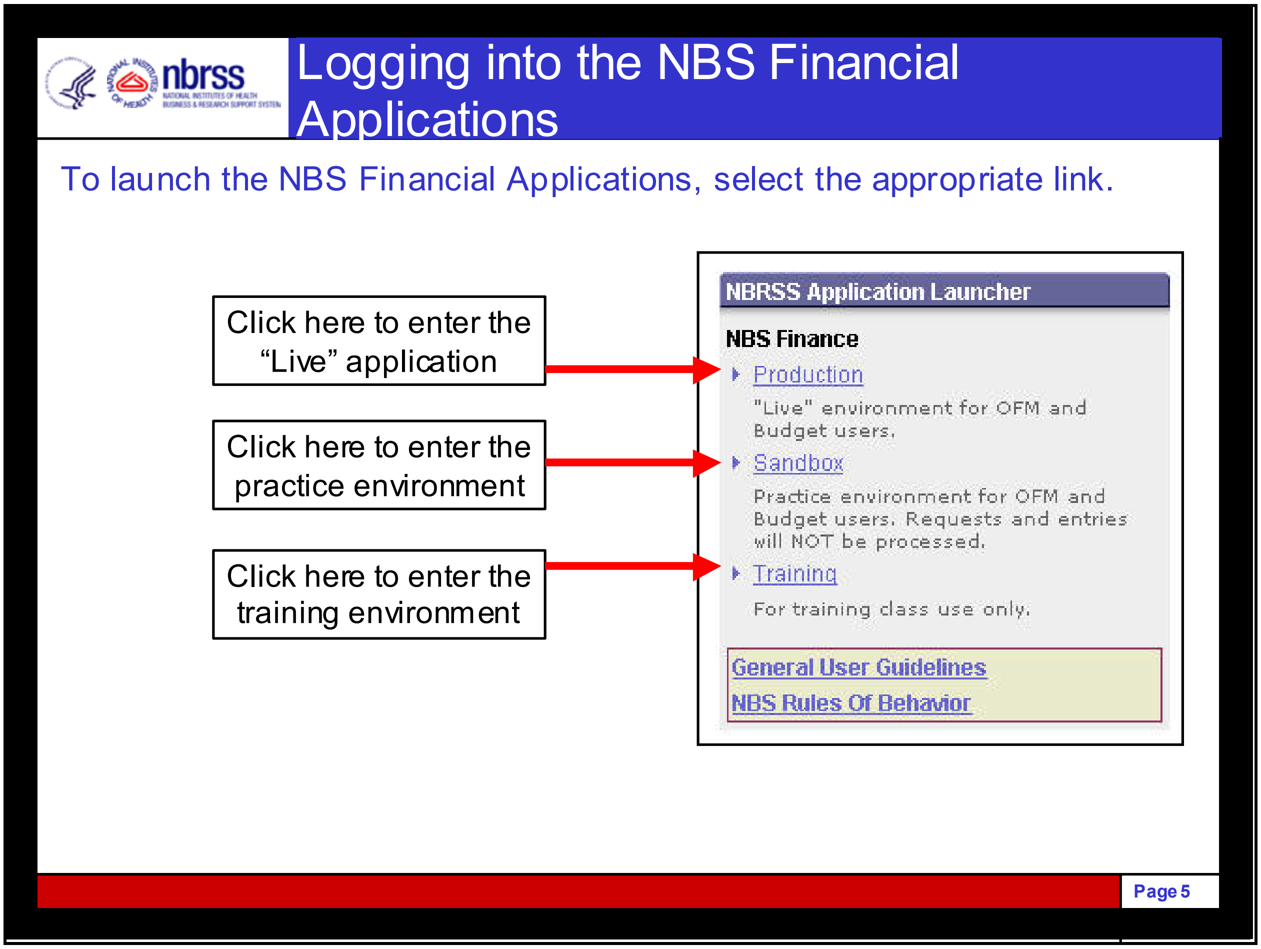
- Oracle is a web-based application available via the NIH Portal

- NIH Portal website: **http://my.nih.gov**
  - To Log on use your:
    - NIH Domain
    - User Name
    - Password
  - For assistance, contact NIH Help Desk at 6-HELP (301.496.4357).

- Add the Budget & Finance Community, which is the page where the Oracle application resides

Page 4

Logging into the NBS Financial Applications



Use the **Production** link to enter the live environment. Only use this link if you are going to perform real work in the system. You should not "practice" here.

Use the **Sandbox** link to enter a practice environment. This environment was created to allow you to practice your skills outside the training classroom. The information entered here will not affect the financial reporting of the NIH.

Use the **Training** link to enter the oracle application for use during training classes. Do not use this link if you are not in an instructor led class.

If you have never logged into Oracle before it will be necessary to install the JINITIATOR prior to logging in. The instructions for doing so follow. Otherwise you may go directly to the section titled "Accessing the Oracle Application" to log in.

Oracle JINITIATOR Installation Instructions

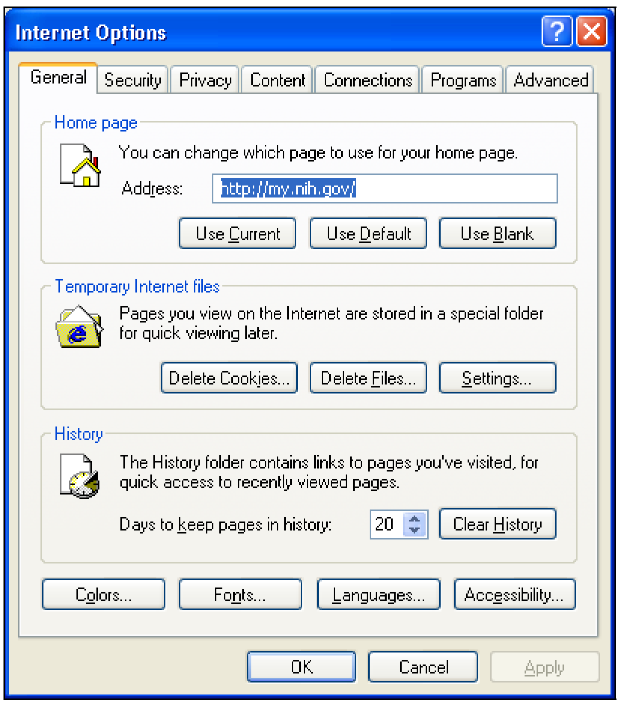
Before you begin:

This document contains instructions for installing Oracle JInitiator using Internet Explorer.
NOTE: Internet Explorer is the recommended browser for the NBS.

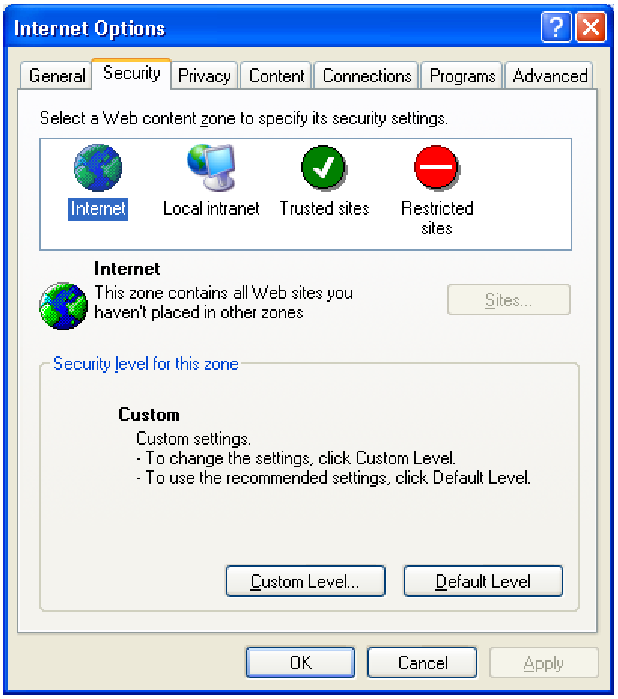
If you have questions or need assistance, please contact your local IT representative, or the NIH Help Desk (301-496-4357).

1. Open Microsoft Internet Explorer (IE).

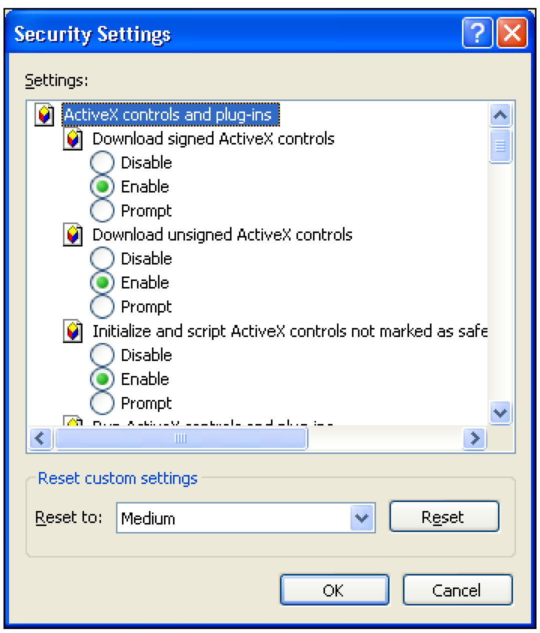
2. In the IE window select Internet Options from the Tools menu.



3. In the Internet Options window, select the **Security** tab.

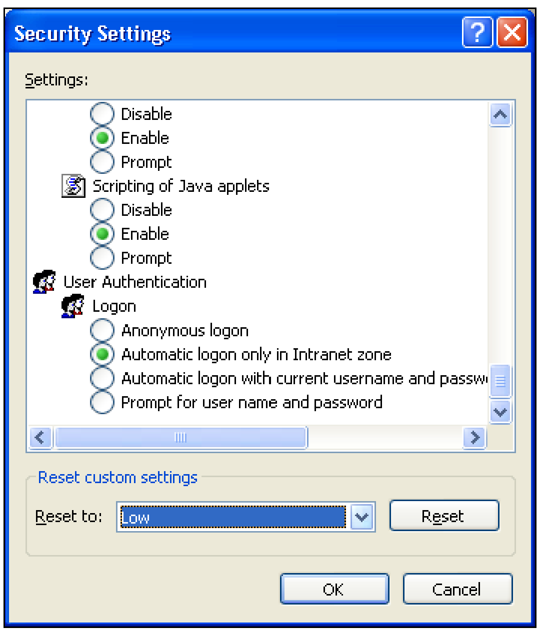


4. Select **Custom Level** button.



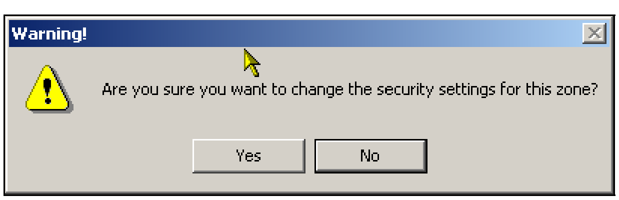
5. In the Security Settings window, click the **Enable** button next to the following settings:
   - Download signed ActiveX controls
   - Download unsigned ActiveX controls
   - Initialize and script ActiveX controls not marked as safe
   - Run ActiveX controls and plug-ins
   - Scripts ActiveX controls marked safe for scripting
   - Downloads > File download
   - Downloads > Font download

- Microsoft VM > Java permissions > Low safety
- Miscellaneous > Access data sources across domains
- Miscellaneous > Allow META REFRESH
- Miscellaneous > Display mixed content
- Miscellaneous > Don't prompt for client certificate selection when no certificates or only one certificate exists
- Miscellaneous > Drag and drop or copy and paste files
- Miscellaneous > Installation of desktop items
- Miscellaneous > Launching programs and files in an IFRAME
- Miscellaneous > Navigate sub-frames across different domains
- Software channel permissions
- Submit nonencrypted form data
- Userdata persistence
- Scripting > Active scripting
- Scripting > Allow paste operations via script
- Scripting > Scripting of Java applets

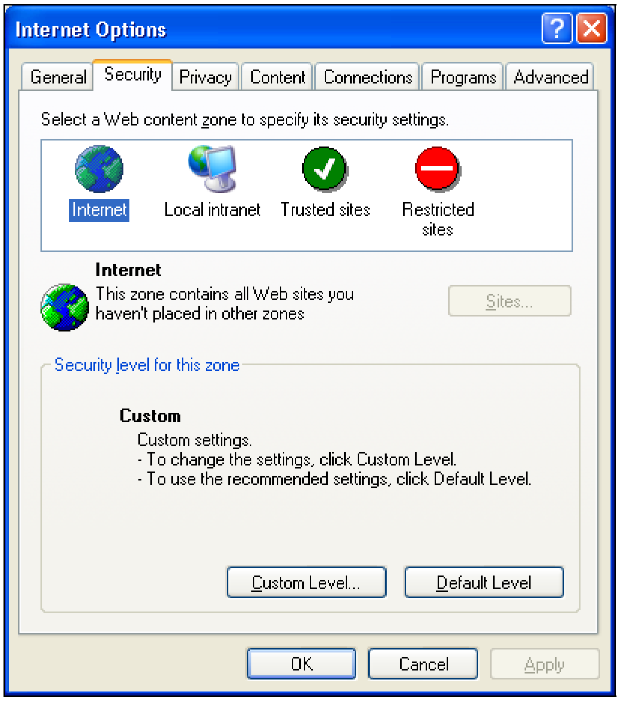


6. Change the Reset custom settings to Low.

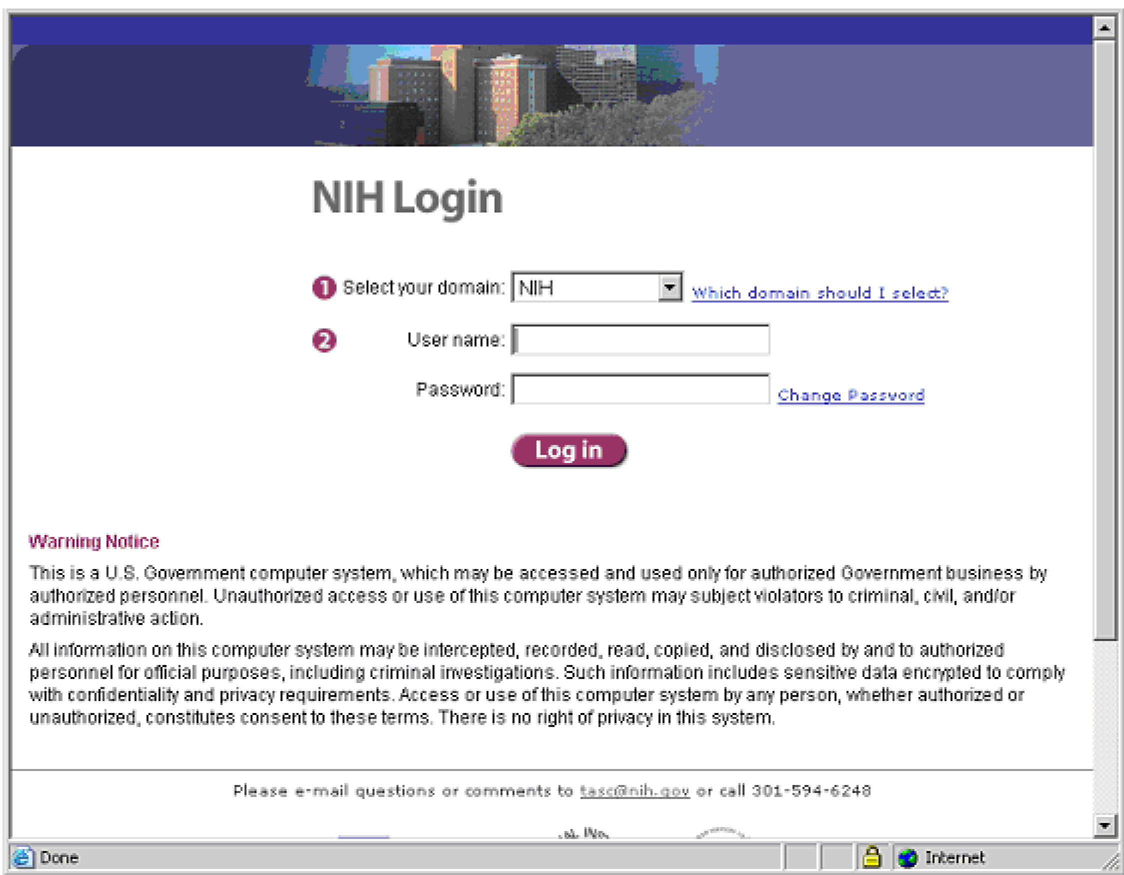
7. Click the **OK** button.



8. Click the Yes button.



9. Click the OK button to exit.



10. In the IE browser window that is open on your desktop, log in to the NIH Portal: http://my.nih.gov with the same Domain, User name and Password you use to log in to your workstation computer.

11. Go to the Budget/Finance Community on the NIH Portal.

If you need to add the Budget and Finance Community, goto task #12. Otherwise, goto task #13.

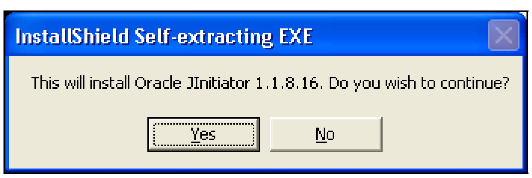
12. To add the Budget/Finance Community to your NIH Portal page:
    - Select the **Communities** tab in the top left portion of the NIH Portal screen.
    - Select **Edit Your Memberships** from the drop down menu.
    - Select the **NBRSS** folder (near the middle of the screen).
    - Select the checkbox for the **NBRSS Budget/Finance** community.
    - Select **Add to My Memberships**.
    - In the top right portion of the same screen, select Finish.

13. To access the NBRSS Budget/Finance community page, select the **Communities** tab and select **NBRSS Budget/Finance** from the drop down menu.

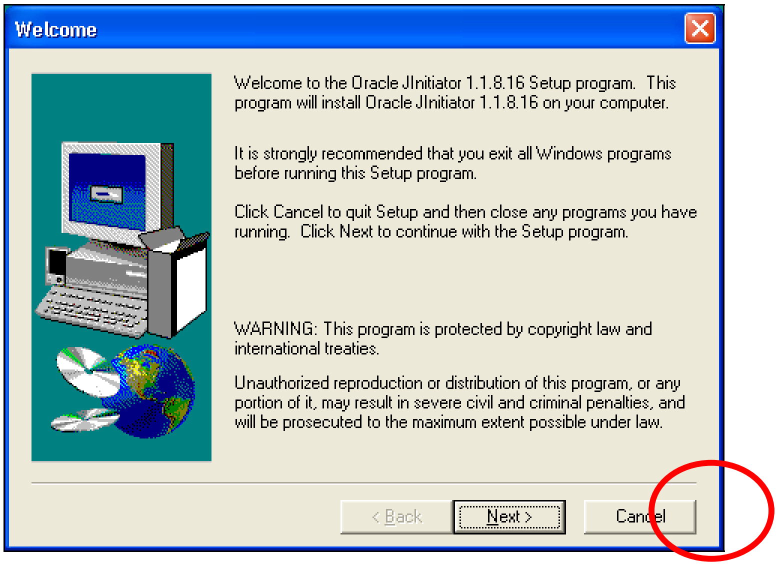
14. In the NBRSS Application Launcher section of the community page, select the **Production** link to access Oracle.

15. Under **Applications**, select a responsibility.

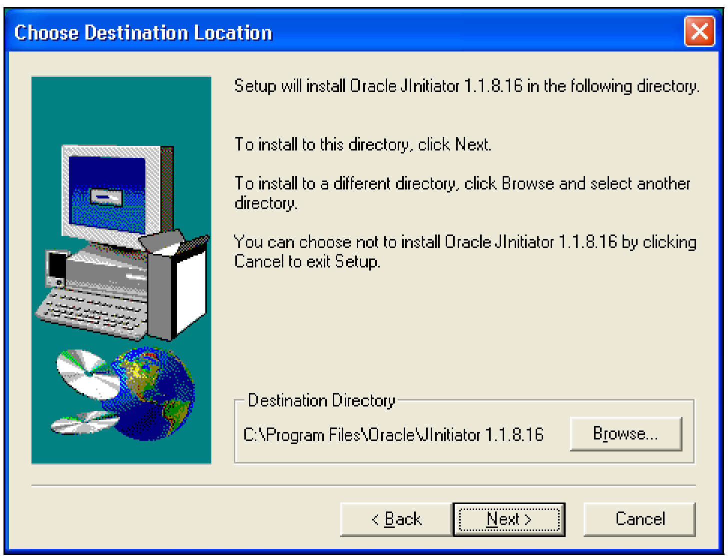
    Result: JInitiator will download files from the server to the client.



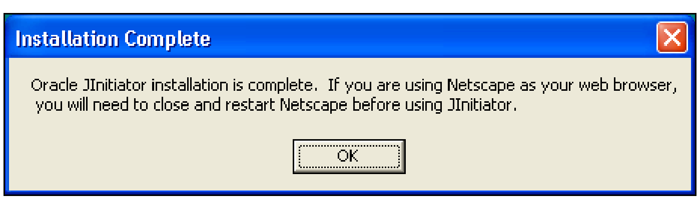
16. Select the Yes button.



17. Select **Next** on the Welcome screen.



18. Select **Next** in the Choose Destination Location window.

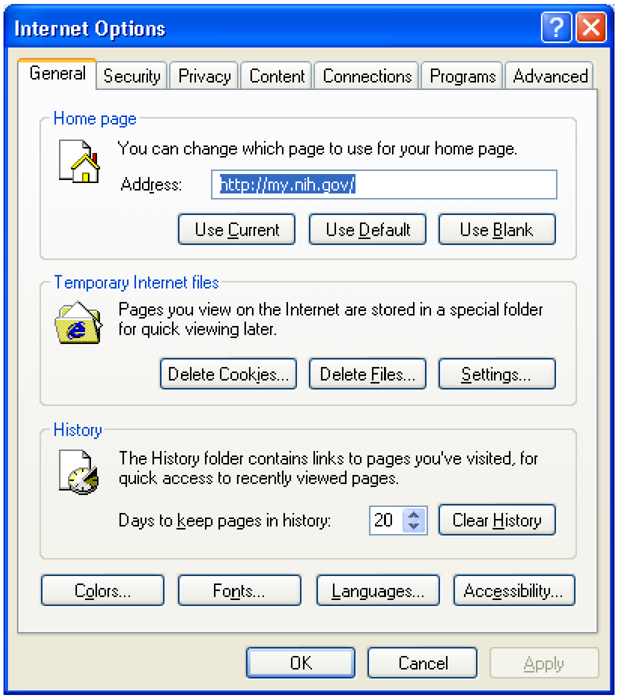


19. Click **OK** once installation is complete.

Result: You are now logged into Oracle with the responsibility you selected earlier in these instructions.

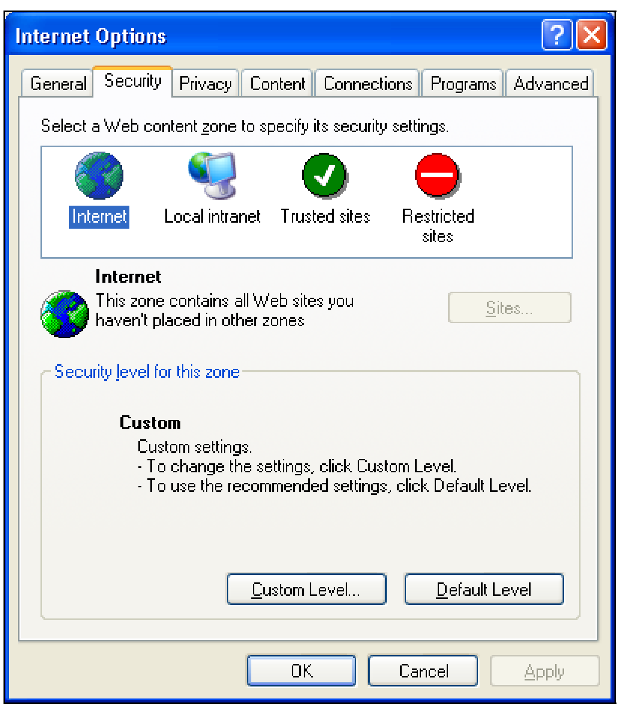
After Installation

20. To reset your IE browser defaults go to the Microsoft Internet Explorer window that is open on your desktop.



21. In the IE window select Internet Options from the Tools menu.

22. Select **Security** tab.



23. Select **Default Level** button.

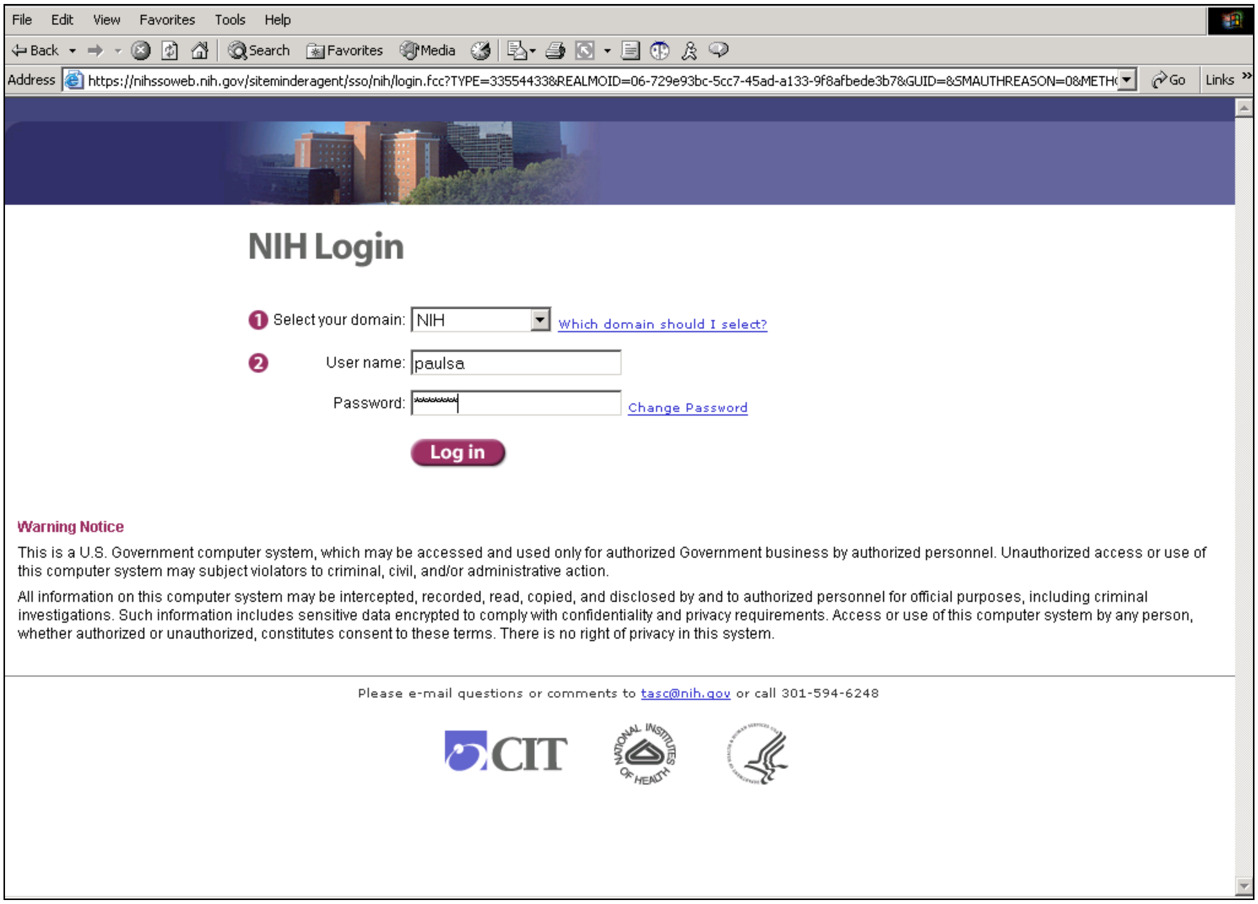
24. Click **Apply.**

25. Click **OK**.

Accessing the Oracle Application

Organization Administrator
N> http://my.nih.gov
NIH Portal

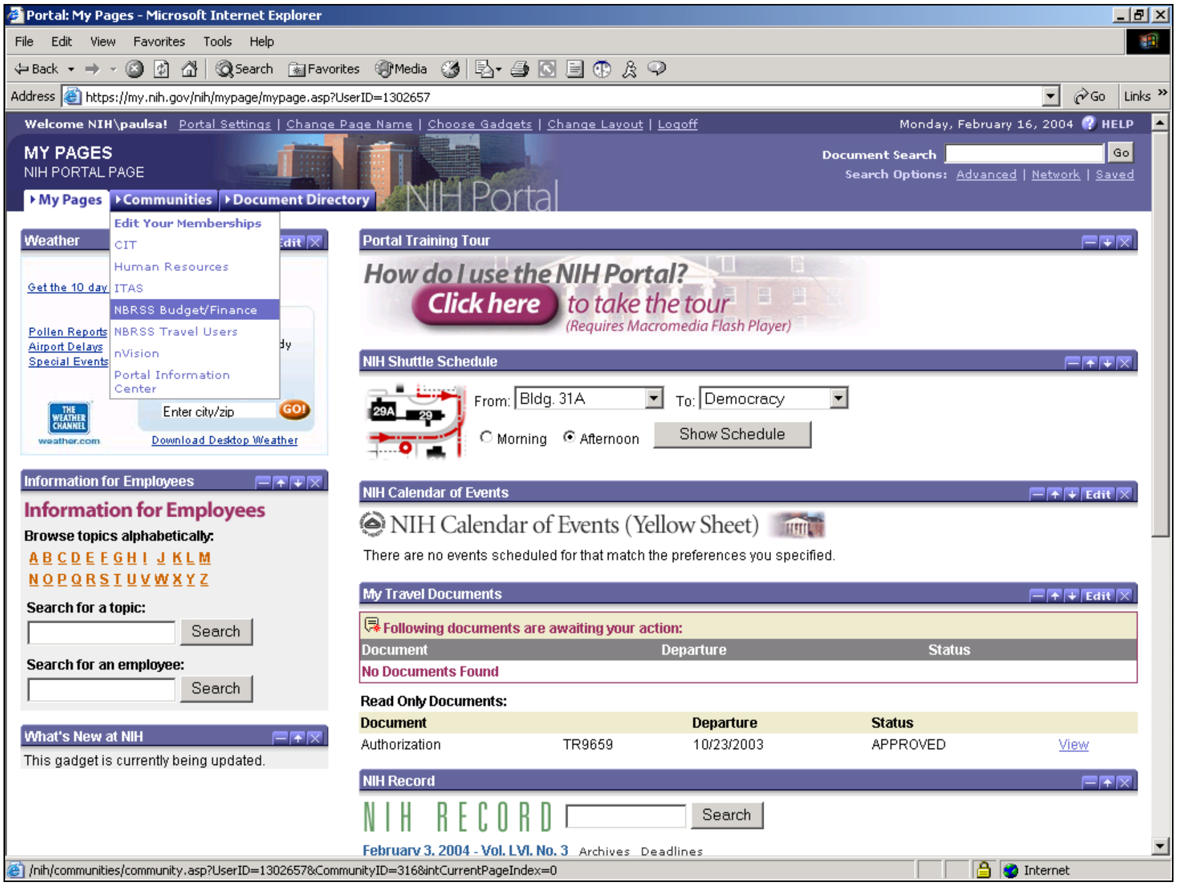
1. Enter the NIH Portal using the web address of your Internet browser.



2. Complete the NIH Login Information:

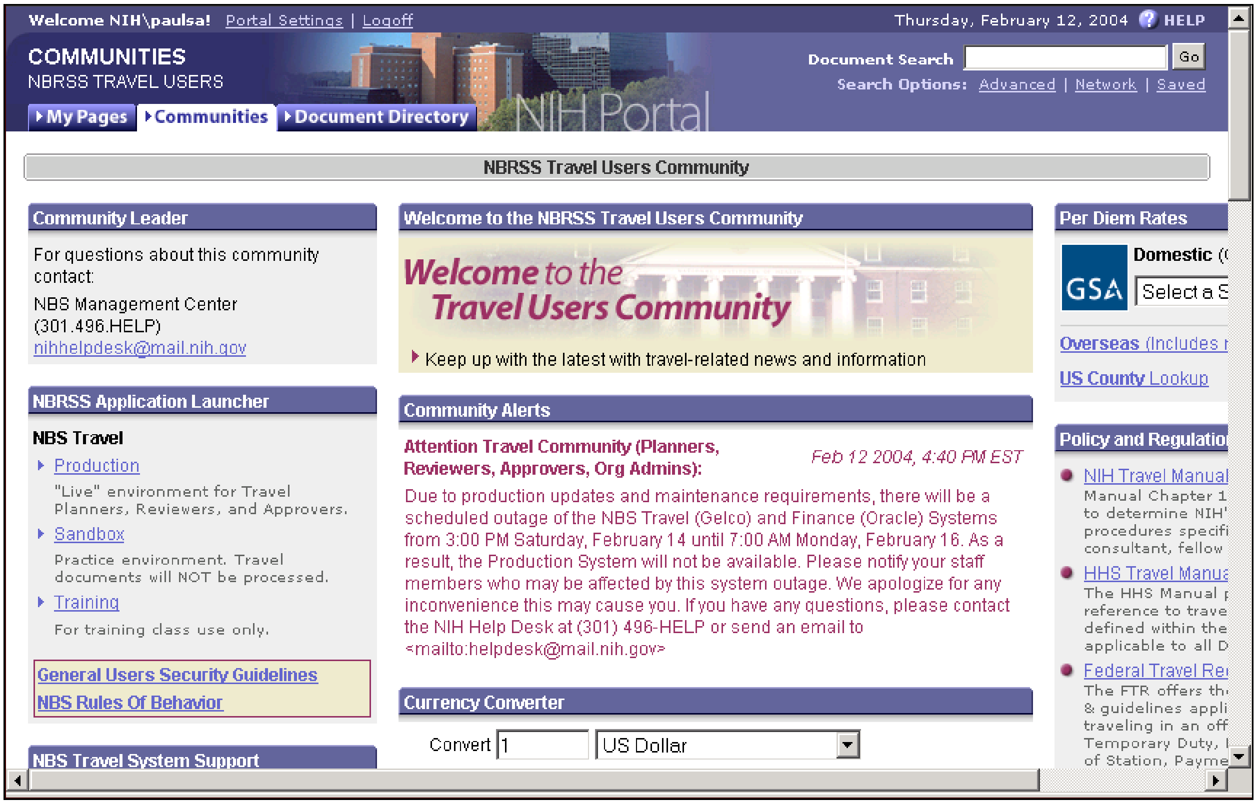
   - Select your **Domain** from the drop down menu.
   - Enter your **User name**.
   - Enter your **Password**.
   - Select **Log in**.

   Note: Your domain, user name and password are the same information you use to log on to your computer workstations. If you need assistance logging in to the NIH Portal or do not know your domain, user name or password, contact TASC at 301.496-4357.



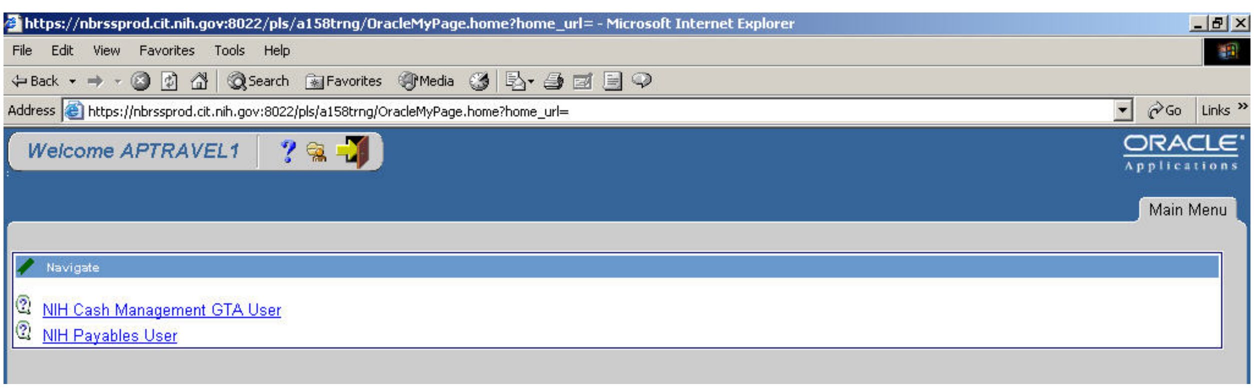
3. From the Communities pull down menu at the top of the page, select **NBRSS Budget/Finance***.

- To add the Budget/Finance Community:
  - Select the Communities tab.
  - Select Edit Your Memberships.
  - Select the NBRSS folder.
  - Select the checkbox for NBRSS Budget/Finance.
  - Select Add to my Memberships.
  - Click Finish.



4. From the NBRSS Budget/Finance Community, select the **NBS Finance Production** link in the NBRSS Application Launcher section in the top left corner.

   Result: Oracle Applications launches.

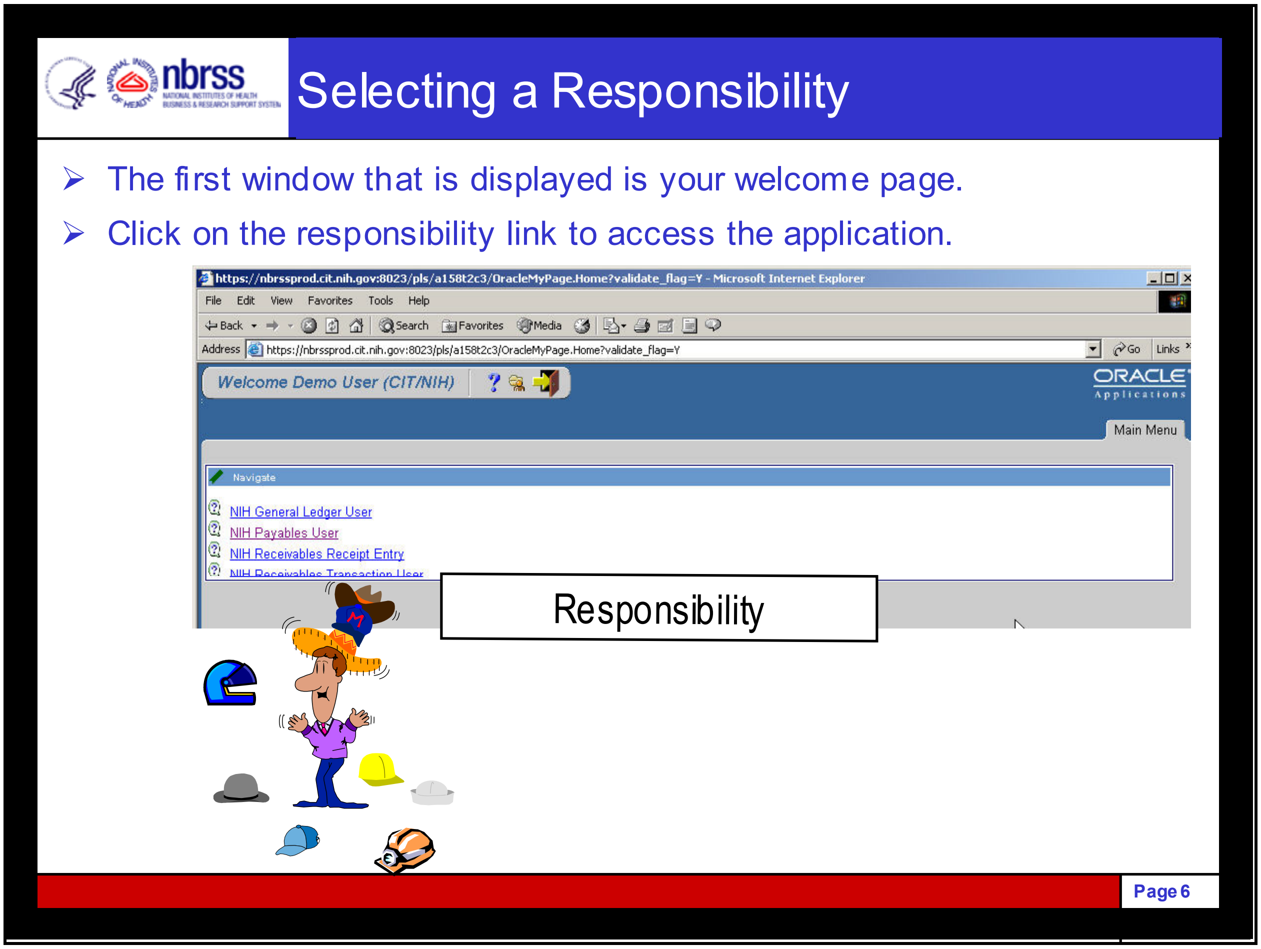


5. Select the responsibility that you want to access.

   Result: The **Oracle J-Initiator** window appears followed by the **Oracle Applications** window.

End of activity.

Selecting a Responsibility



Selecting a Responsibility

Once you have used the logon form to begin the logon process, you must tell the system what type of access you will be using. A *responsibility* is a set of data, menus, and forms that defines your particular level of authority while using the system.

Responsibility Assignments

The Organization Administrator will use the following responsibilities depending on the type of user being added:

NIH Non Affiliates Entry User -- for Non NIH Affiliated travelers

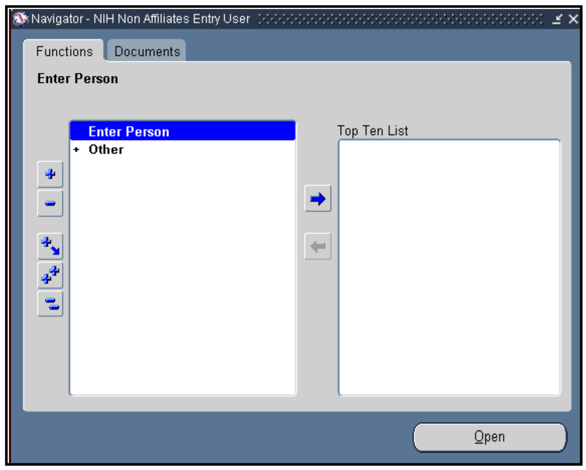
NIH Baltimore Patient Entry User -- for Baltimore Patient travelers

NIH Phoenix Patient Entry User -- for Phoenix Patient travelers

Each user has at least one responsibility and several users can share the same responsibility. If you have only one responsibility with one function, and only one region on your Personal Homepage, you will go directly to that function. If you have multiple responsibilities, select the underlined link in the Application section to select the desired responsibility. Once you click on the link, you will have an opportunity to change responsibilities, if necessary.

NIH Non Affiliates Responsibility

- All Organization Administrators will see the screen below for the NIH Non Affiliates Responsibility
  - Select **Enter Person** to request a new Non NIH-Affiliated traveler or to modify a current record
  - Select **Other** to Run the New Traveler Addition Audit Report



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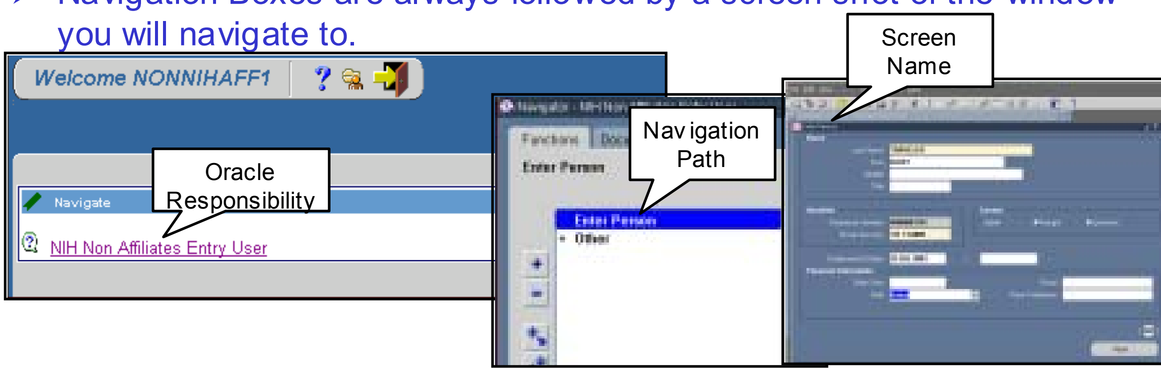
How to Use the Step by Step Instructions

How to Use the Step by Step Instructions

- Navigation Boxes within the step-by-step instructions describe how to get to the appropriate screen in Oracle to perform the task

NIH Non Affiliates Entry User	***Oracle Responsibility***
N > Enter Person	***Navigation Path***
Enter Person	***Screen Name***

- Navigation Boxes are always followed by a screen shot of the window you will navigate to.



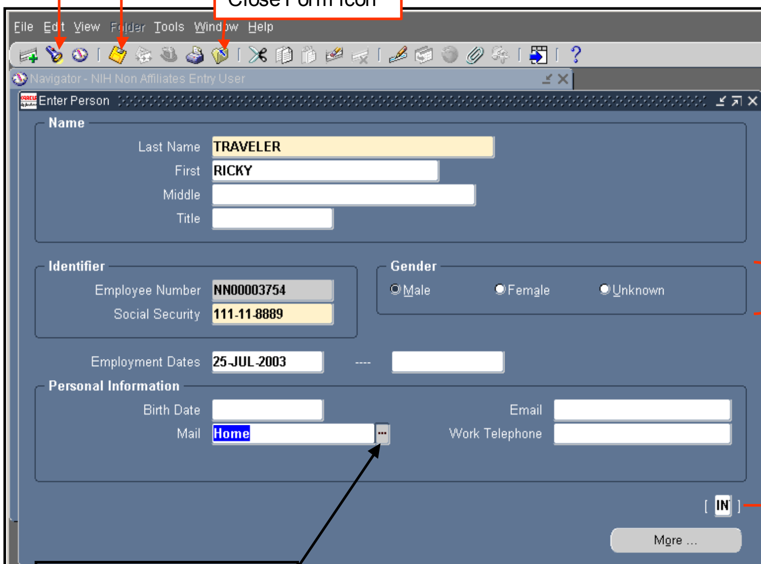
Page 8

Org Admin - Oracle Window Basics

Find icon

Save icon

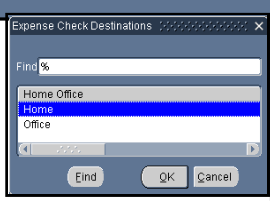
Close Form icon



Field Colors	
Field Color	Description (attributes of the field)
White	Allows data entry
White w/ green text	Indicates drill-down capability
Beige	Requires data entry
Gray w/ black text	Display only
Blue	Indicate fields to use in Query Enter mode

Block: A block is just a named bordered section within a window (e.g. Gender block).

Flexfield: Opens a separate window that contains customized NIH-specific selection information (e.g. Additional Personal Details window for entering Employee Type).



LOV (List of Values) icon: If you select a field and the LOV icon appears to the right of the field, that means a list of acceptable input values is available. When you select the LOV icon to display a list, the values appear in a window with a title that describes the contents.

Shortcut Keys in Oracle

Function/Purpose	Key
Clear Form	F8
Clear Record	F6
Enter Query	F11
Execute Query	Ctrl + F11
Exit	F4

Field Colors in Oracle

- Field colors indicate the attributes of the field.

Field Color	Description
White	Allow data entry
White with Green Text	Indicate drill-down capability
Yellow	Require data entry
Gray with black text	Are display only
Blue	Indicate fields to use in Query-Enter mode

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What Field Colors Indicate

Each block contains fields you use to enter, view, update, or delete information. A field prompt describes each field by telling you what kind of information appears in the field or what kind of information you should enter in the field. Fields are color coded to indicate their type as follows:

White Fields—allow data entry

White Fields with Green Text—indicate drill-down capability

Yellow Fields—require data entry

Gray Fields with Black Text—are display-only

Blue Fields—indicate fields to use in Query-Enter mode

The term field generally refers to a text field, an area in a window that either displays data or allows you to enter data. However, a field can also include a button, check box, option group, or poplist.

New Traveler Addition Audit Report

NIH-Affiliated Travelers

NIH Employees, Fellows, Consultants, and Contractors

- The NIH Enterprise Directory (NED) and Human Resource Data Base (HRDB) systems automatically transfer new Traveler data to the NBS every two weeks*
- Run the New Traveler Addition Audit Report in Oracle
  - Identifies new NIH-Affiliated Travelers that have been added to the system
- The Organization Administrator (Org Admin) completes the Traveler Profile in the GTM Admin 8.1 Module, as necessary

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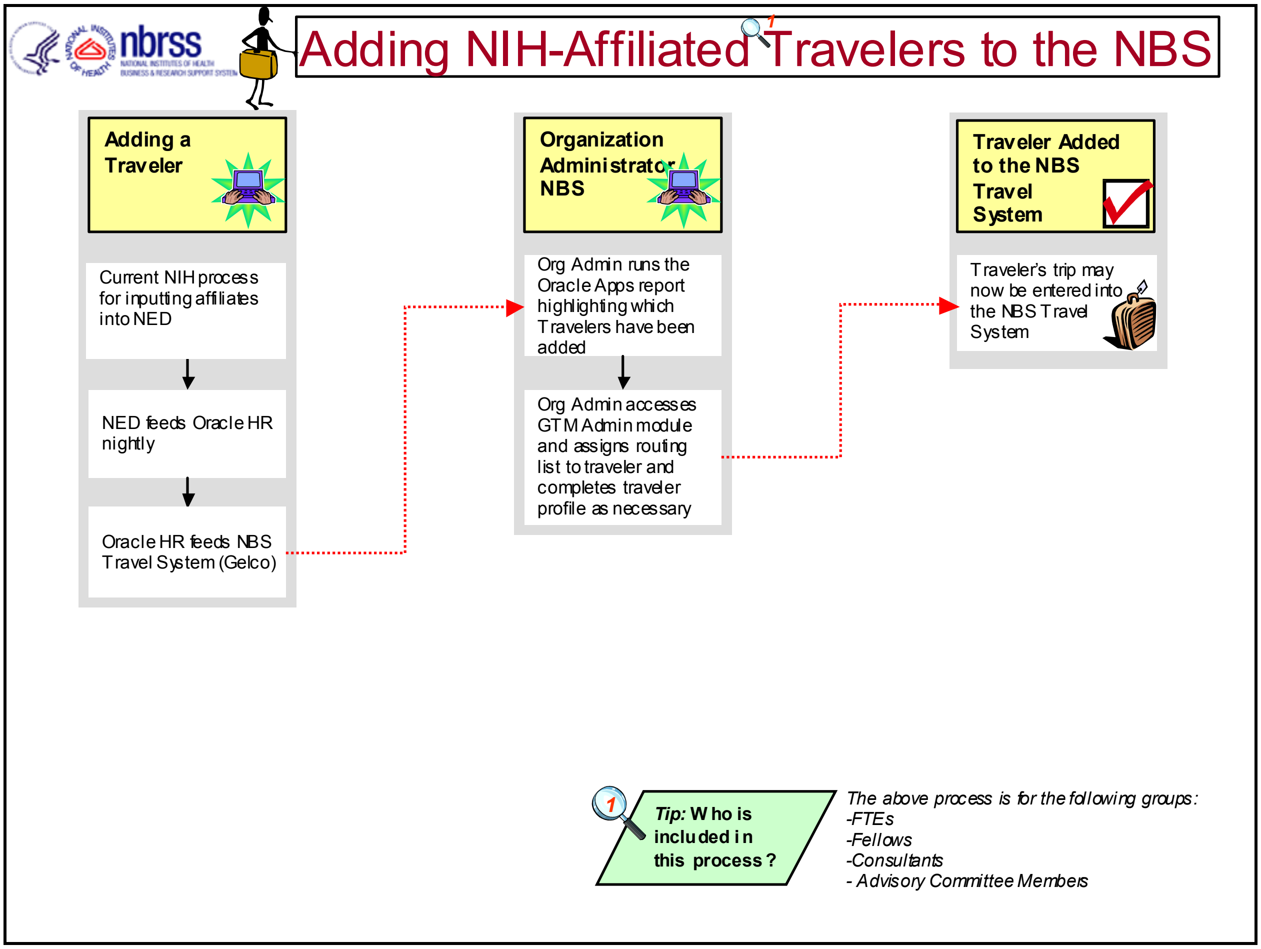
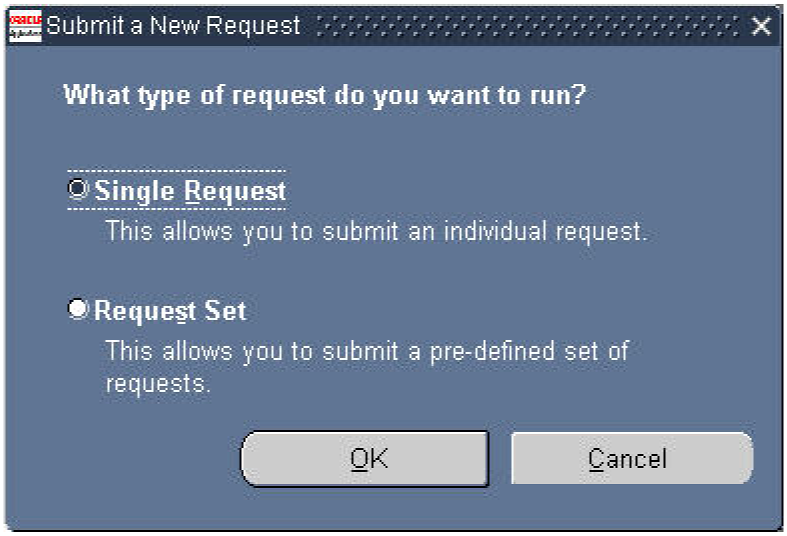

Adding NIH-Affiliated Travelers to the NBS
Adding a Traveler
Current NIH process for inputting affiliates into NED
NED feeds Oracle HR nightly
Oracle HR feeds NBS Travel System (Gelco)
Organization Administrator NBS
Org Admin runs the Oracle Apps report highlighting which Travelers have been added
Org Admin accesses GTM Admin module and assigns routing list to traveler and completes traveler profile as necessary
Traveler Added to the NBS Travel System
Traveler's trip may now be entered into the NBS Travel System
Tip: Who is included in this process?
The above process is for the following groups:
-FTEs
-Fellows
-Consultants
- Advisory Committee Members

Submitting the New Traveler Addition Audit Report

NIH Non Affiliates Entry User
N > Requests > Run
Submit a New Request

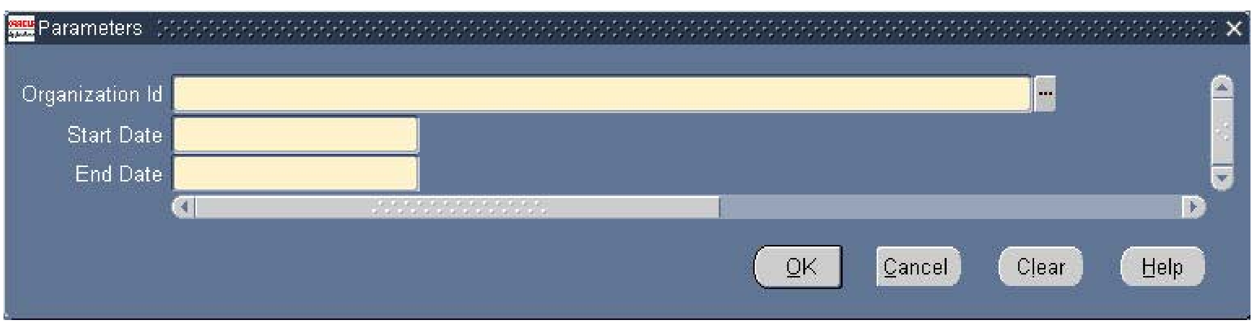


1. Select the **OK** button.

   Result: The **Submit Request** window is displayed.

2. Click on the **LOV** in the **Name** field and select **NIHTM New Traveler Addition Report**.

   Result: The **Parameters** window is displayed.



3. In the **Organization ID** field, select the organization from the **LOV** for which you would like the report to be run.

   Note: If you would like all new entries to be displayed, select **HN.**

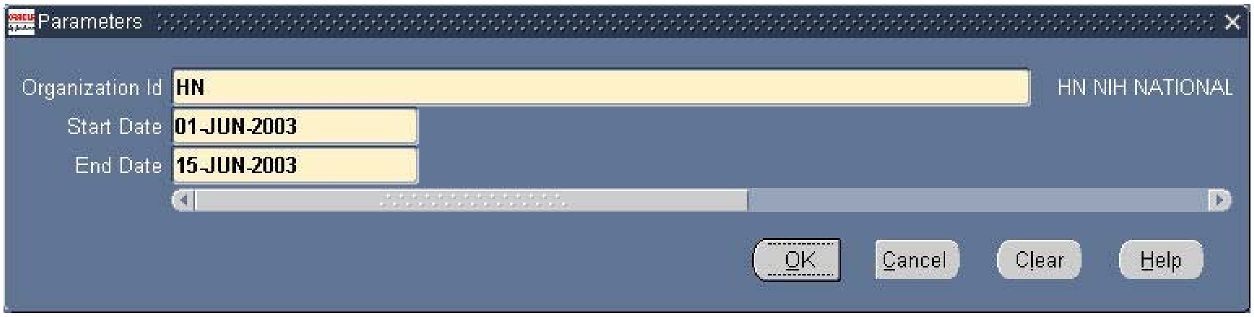
4. Tab to the **Start Date** field and enter the date from which you would like to review the entries.

Note: The date format DD-MMM-YYYY must be followed.

5. Tab to the **End Date** field and enter the date to which you would like to review the entries.

   Note: The date format DD-MMM-YYYY must be followed.

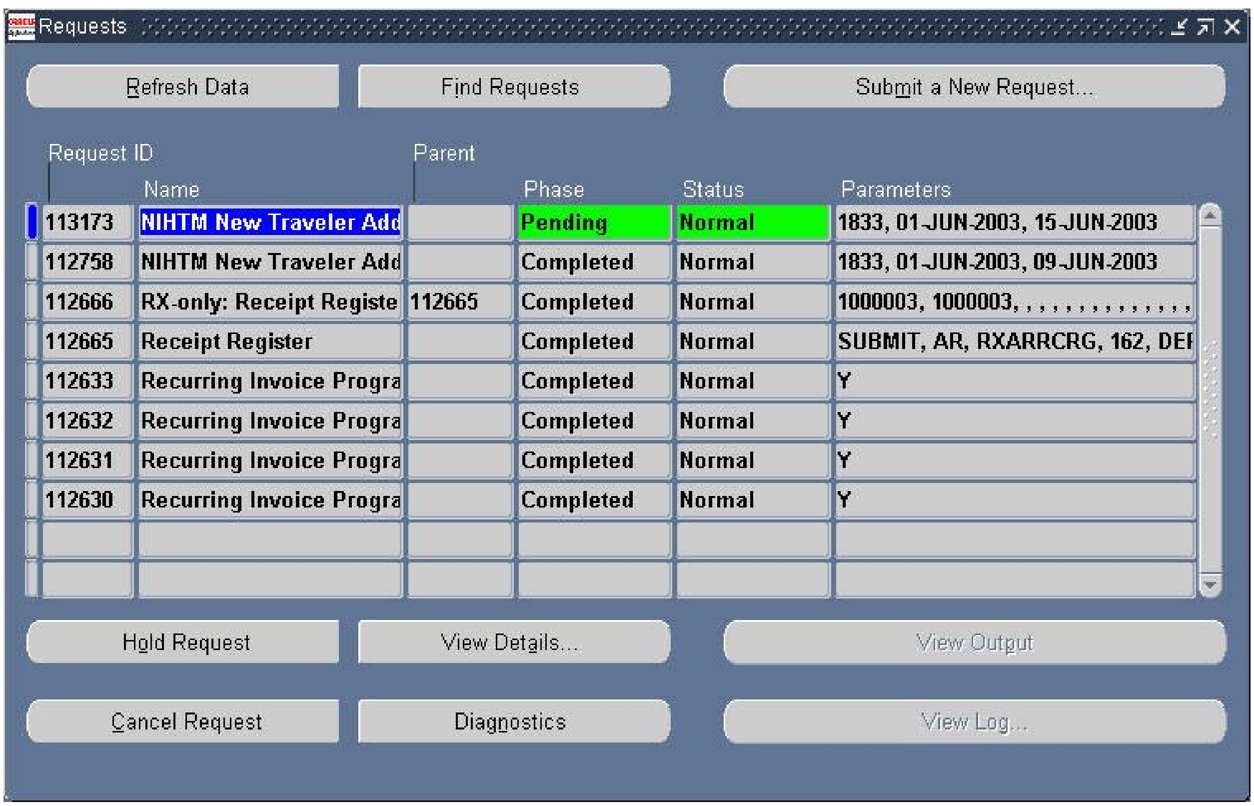
   Example: Below is an example completed parameters window.



6. Select the **OK** button.

7. Select the **Submit** button.

   Result: The **Requests** window is displayed.



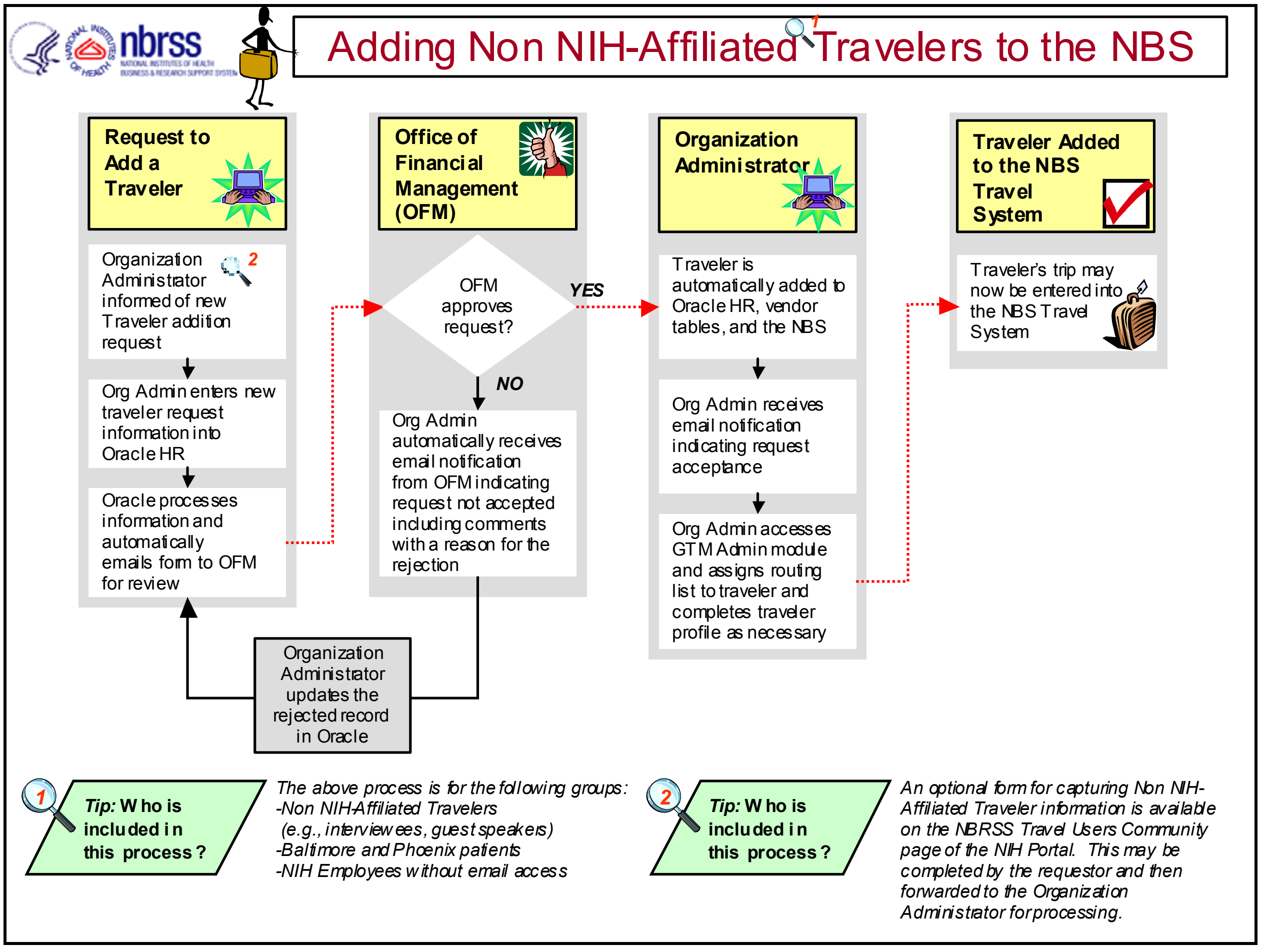
8. Select the **Refresh Data** button until the **Phase** is completed.

9. Select the **View Output** button to view the report.

End of activity.

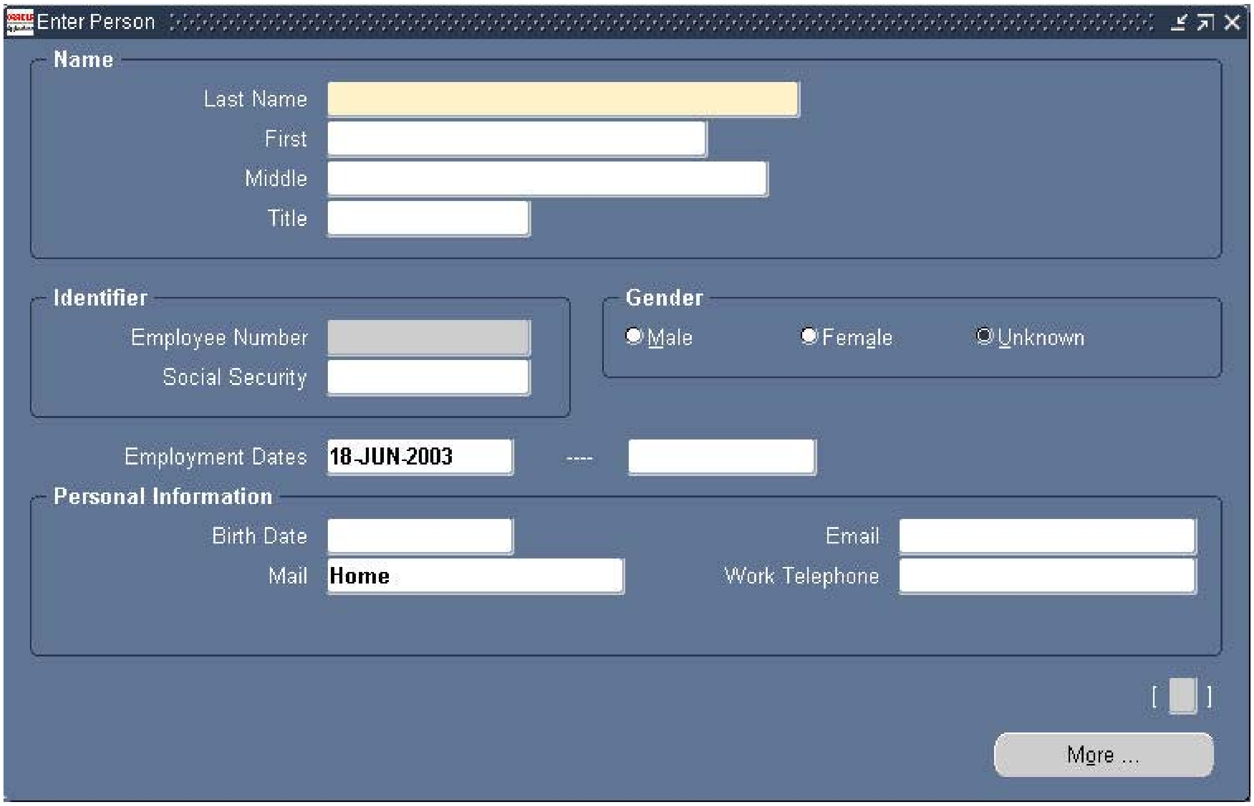
Organization Administrators will process requests for entering a new Non NIH-Affiliated traveler into the system and submit them to OFM. However, each IC will have to establish their process for generating and submitting these requests to the Organization Administrators.

Organization Administrators will complete an Oracle form as described in the next few pages. This form feeds the Oracle HR personal data screen but not the ACH portion. ICs must submit the ACH form (a paper document filled out by the traveler's bank) directly to the Government Accounting Office. When the ACH form arrives at this final destination, the OFM staff member will then access the traveler's data screen in Oracle, review the data that was entered by the Organization Administrator, and add the ACH on an appending screen. No Travel documents can be prepared without the ACH in place.


Adding Non NIH-Affiliated Travelers to the NBS
1
nbrss
NATIONAL INSTITUTES OF HEALTH BUSINESS & RESEARCH SUPPORT SYSTEM
Request to Add a Traveler
Organization Administrator informed of new Traveler addition request
2
Org Admin enters new traveler request information into Oracle HR
Oracle processes information and automatically emails form to OFM for review
Office of Financial Management (OFM)
OFM approves request?
YES
NO
Org Admin automatically receives email notification from OFM indicating request not accepted including comments with a reason for the rejection
Organization Administrator updates the rejected record in Oracle
Organization Administrator
Traveler is automatically added to Oracle HR, vendor tables, and the NBS
Org Admin receives email notification indicating request acceptance
Org Admin accesses GTM Admin module and assigns routing list to traveler and completes traveler profile as necessary
Traveler Added to the NBS Travel System
Traveler's trip may now be entered into the NBS Travel System
1
Tip: Who is included in this process?
The above process is for the following groups:
-Non NIH-Affiliated Travelers
(e.g., interviewees, guest speakers)
-Baltimore and Phoenix patients
-NIH Employees without email access
2
Tip: Who is included in this process?
An optional form for capturing Non NIH-Affiliated Traveler information is available on the NBRSS Travel Users Community page of the NIH Portal. This may be completed by the requestor and then forwarded to the Organization Administrator for processing.

Entering a New Non-NIH Affiliated Traveler Request

NIH Non Affiliates Entry User
N > Enter Person
Enter Person



1. Enter the traveler's last name in the **Last Name** field.

2. Tab to the **First** field and enter the traveler's first name.

   Result: The **Employee Number** field will be populated with a value beginning with "NN".

3. In the **Social Security** number field enter the individual's social security number.
   - Note: If no social security number is available, leave the field blank and enter a comment in the **flexfield** to the right of the **Details** box that states "Please assign a temporary 'filler' SSN." The **Details** box is documented below (Step 13).

4. In the **Gender** block, select the gender of the traveler.

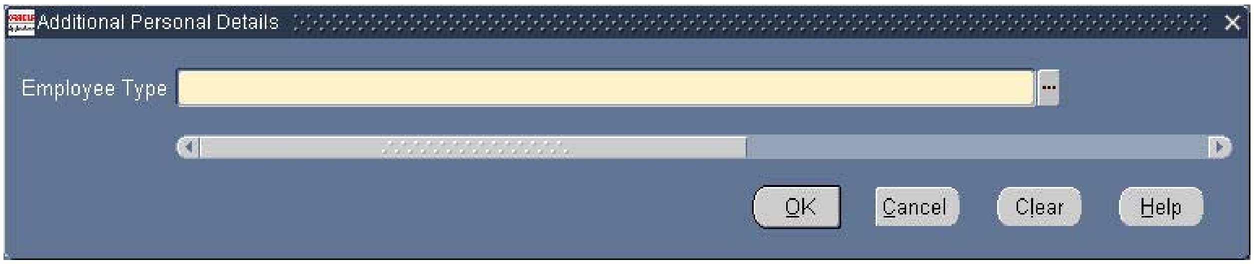
5. Enter the following in the **Personal Information** block:

   Note: These fields are optional.

Field	Description
Birth Date	Enter the traveler's birth date
Mail	Select **Home** or **Office** from the **LOV**
E-mail	Enter the traveler's email address
Work Telephone Number	Enter the traveler's work telephone number

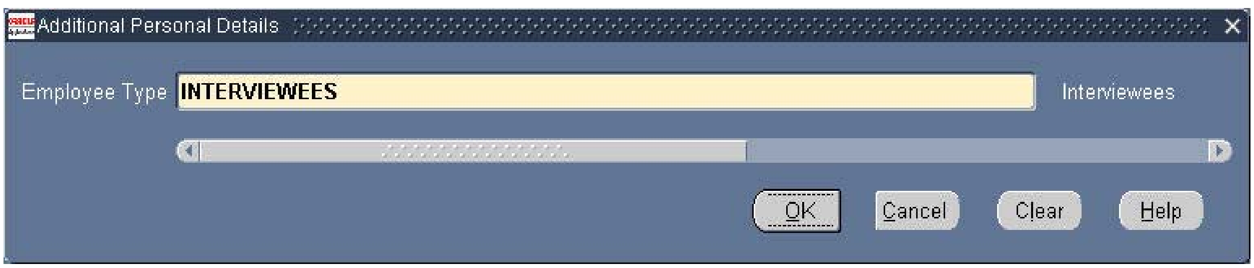
6. Place your cursor in the **Flexfield []**.

   Result: The **Additional Person Details** window is displayed.



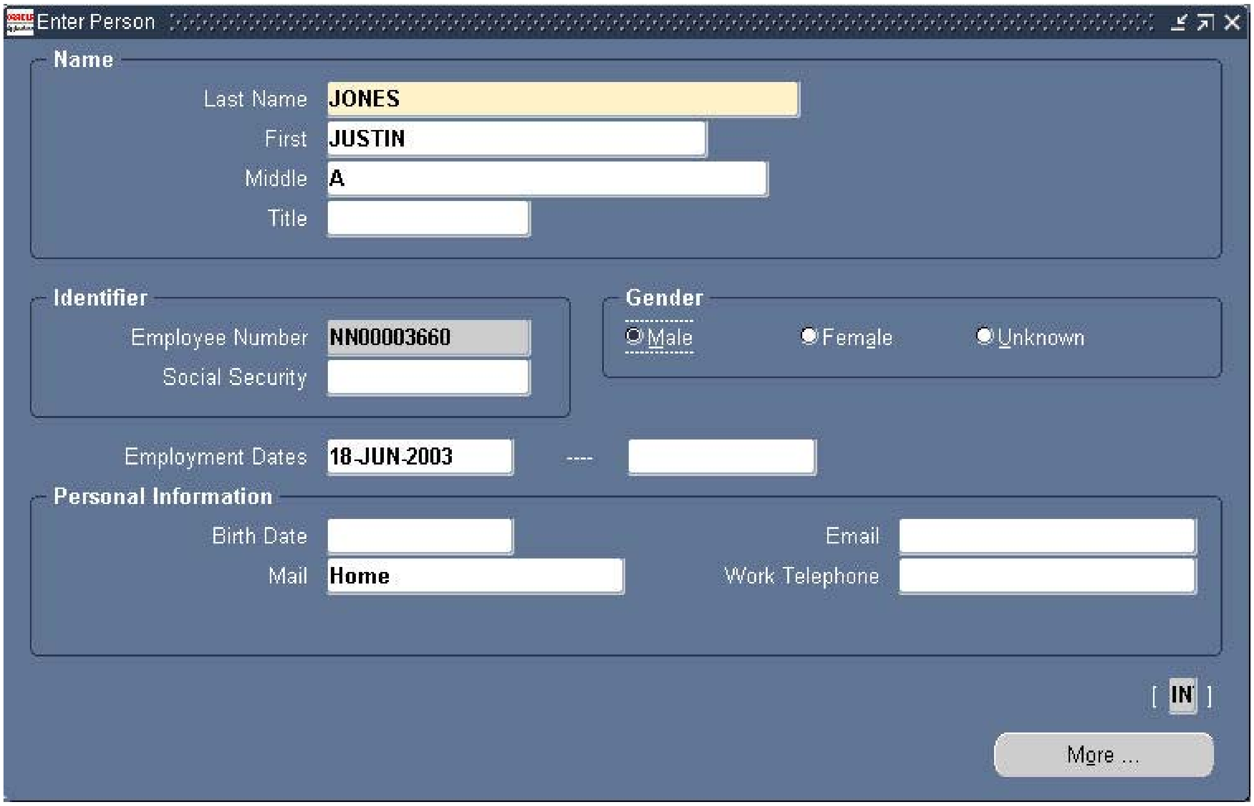
7. In the **Employee Type** field, use the **LOV** to select the appropriate type of traveler.

   Example: Below is a sample completed flexfield.



8. Select the **OK** button.

   Result: The **Additional Personal Details** window closes and you are returned to the **Enter Person** window.

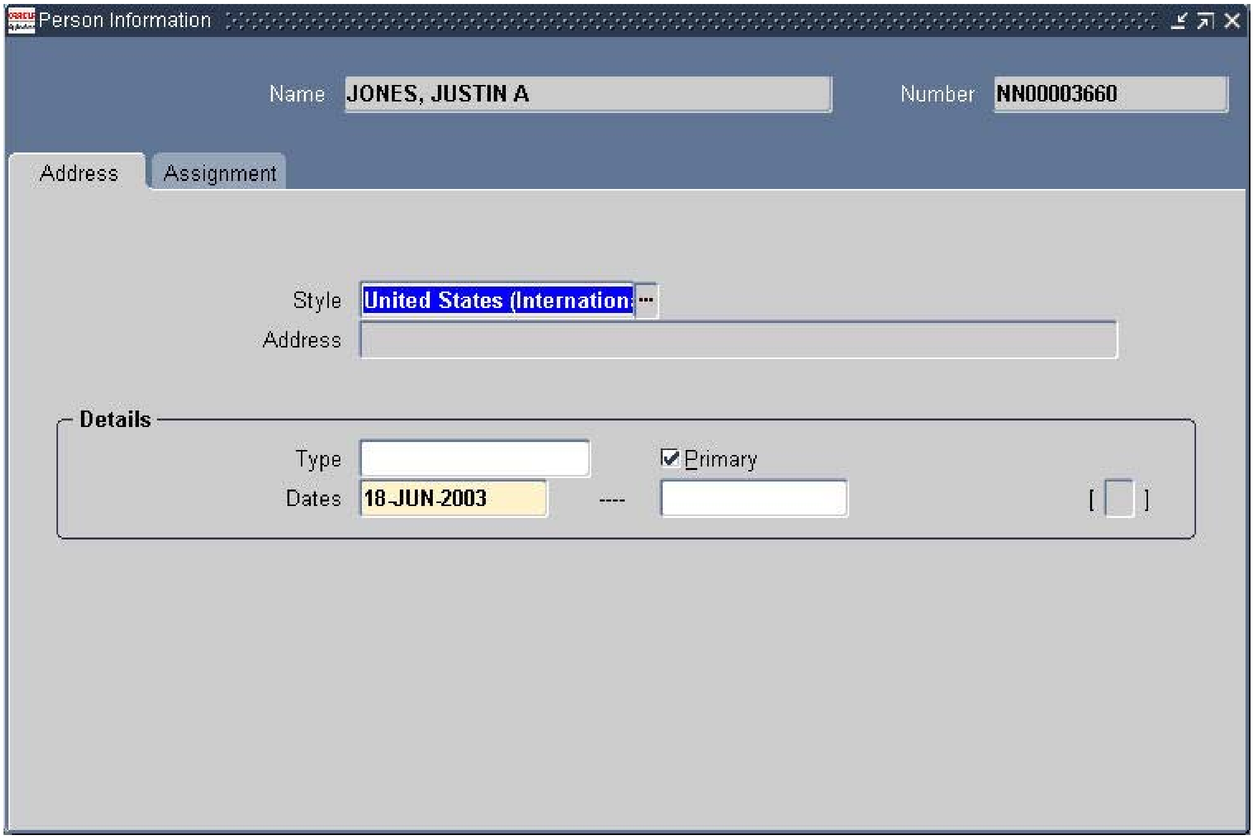


9. Save your changes.

   Note: You must save the record before proceeding to the next step or the system will stop you.

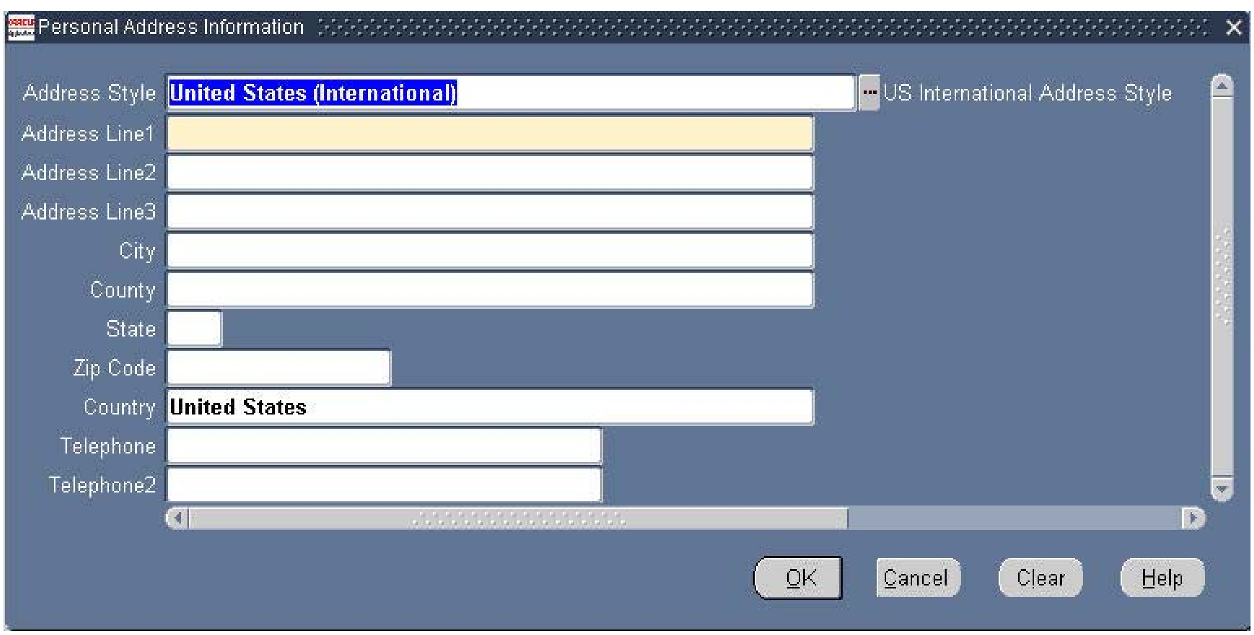
10. Select the **More** button.

    Result: The **Person Information** window is displayed.



11. Place your cursor in the **Address** field.

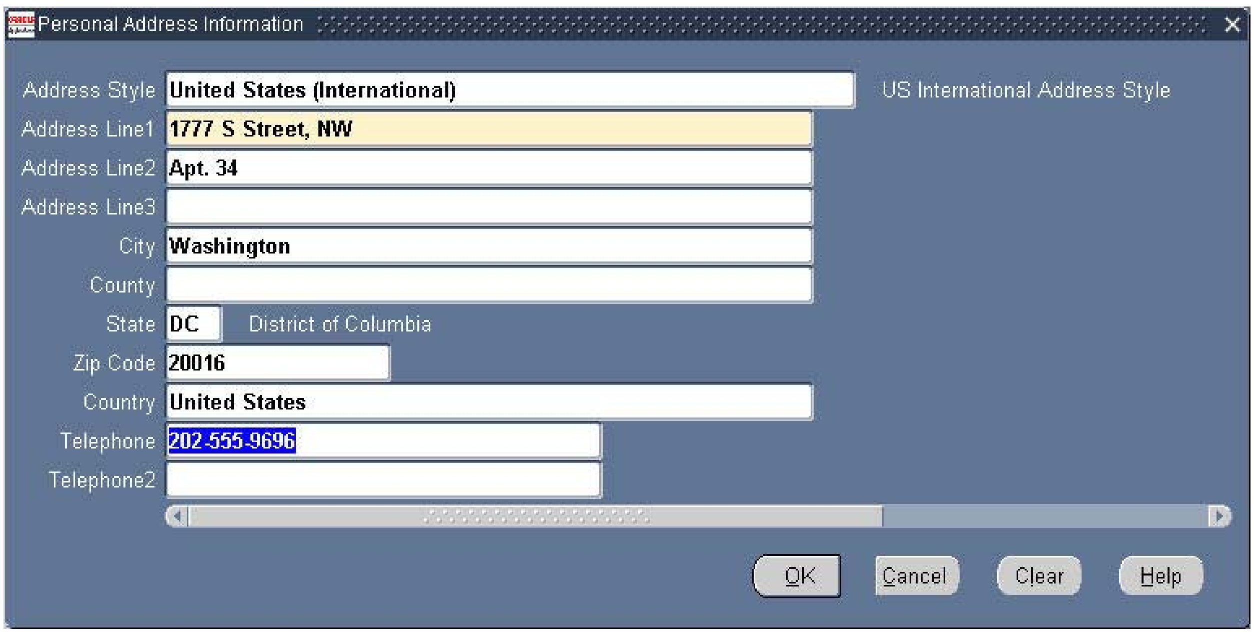
 Result: The **Personal Address Information** window is displayed.



12. Enter the traveler's address and telephone information as described below.

Field Name	Description
Address Style	Defaults to **United States (International)**. Do not change.
Address Line1	Enter the street address of the person.
Address Line2	Enter additional street address information.
Address Line3	Enter additional street address information.
City	Enter the city information
County	Enter the county information
State	Select the state information from the **LOV**.
Zip Code	Enter the zip code
Country	Select a country from the **LOV**.
Telephone	Enter a telephone number for the person.
Telephone2	Enter an alternative telephone number for the person.

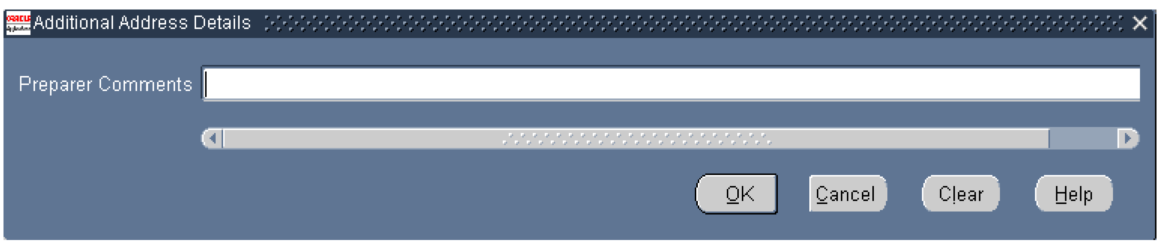
Example: Below is a sample completed **Personal Address Information** form.



13. Select the **OK** button.

    Result: You are returned to the **Person Information** window.

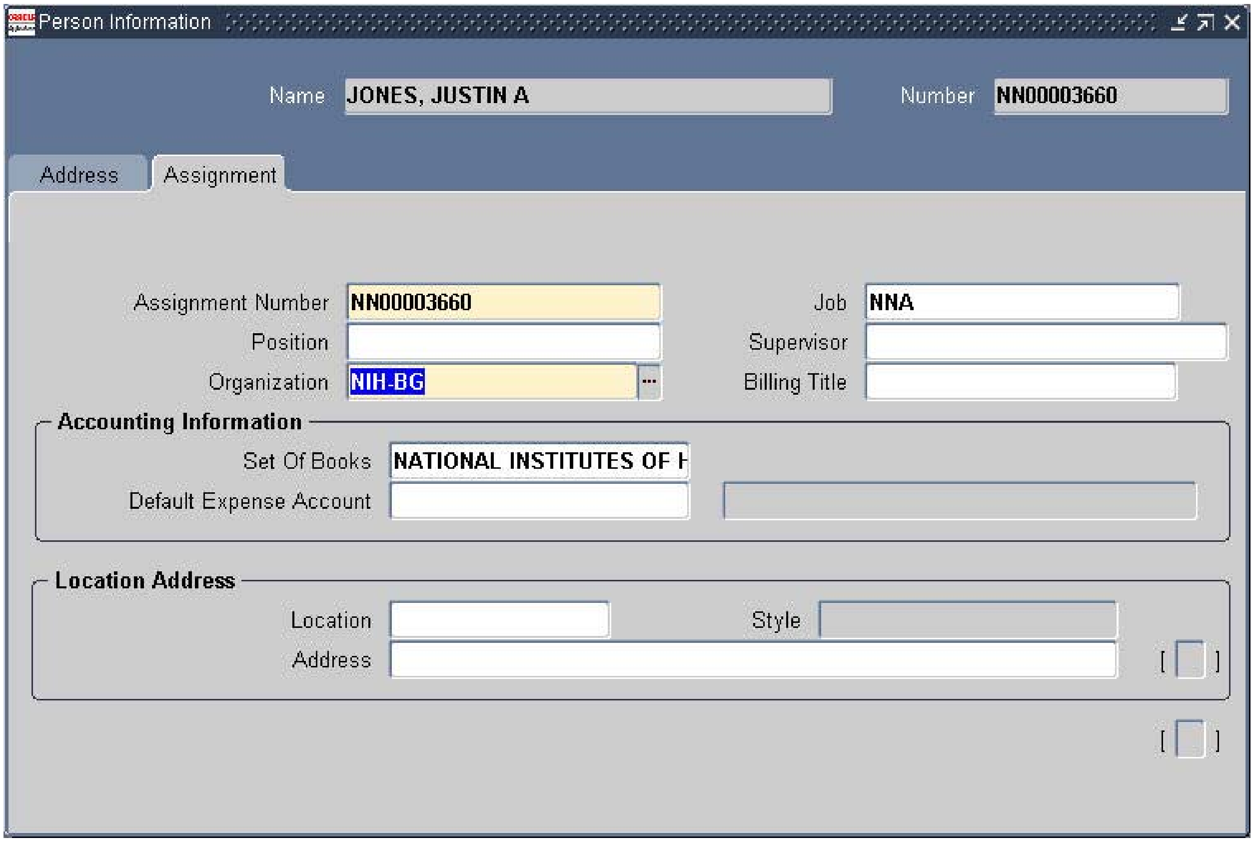
Note: To enter any additional information about this traveler, use the **flexfield** located on the right side of the **Details** box.



Result: The **Additional Address Details** window is displayed. Enter the comments in the **Preparer's Comments** field. When finished, select the **OK** button.

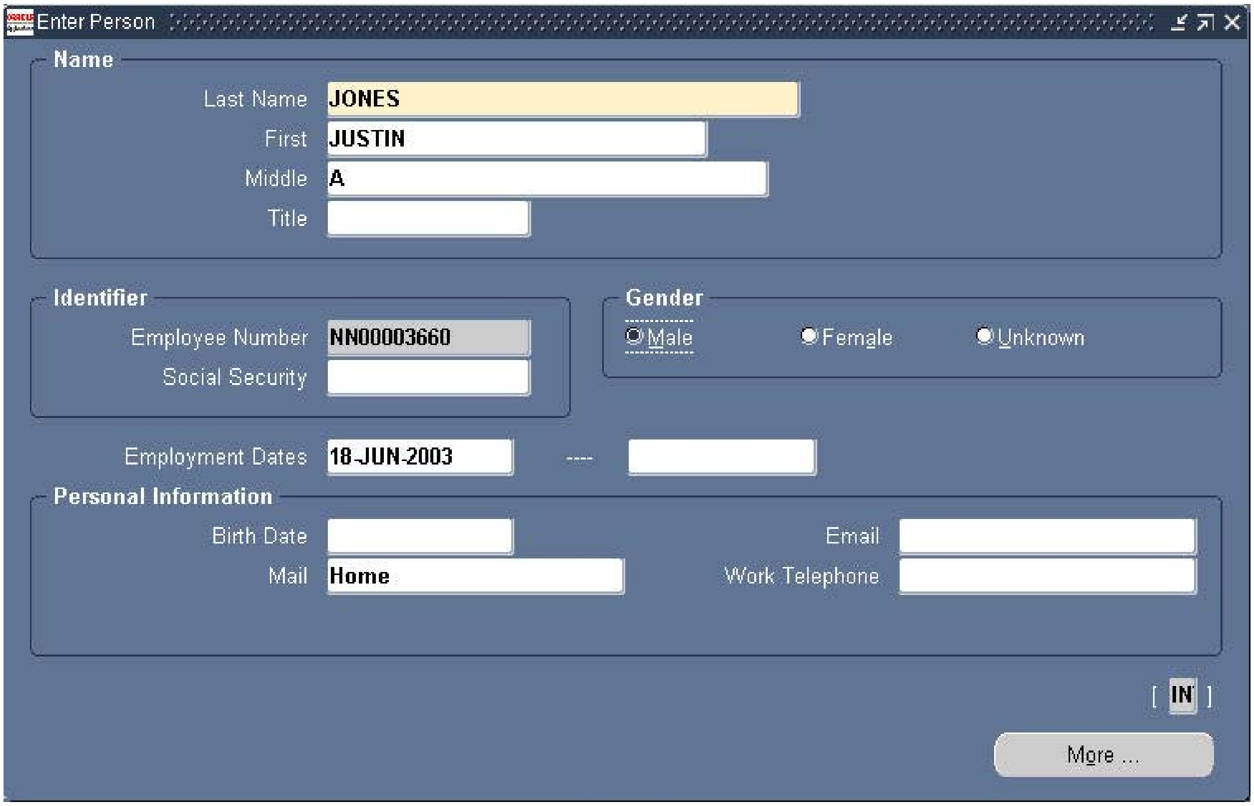
Result: The **Additional Address Details** window closes and you are returned to the **Person Information** window.

14. Select the **Assignment** tab.



15. Tab to the **Organization** field and use the **LOV** to locate the correct organization.
16. Save your work.
17. Close the **Person Information** window.

<u>Result</u>: The **Enter Person** window is displayed.

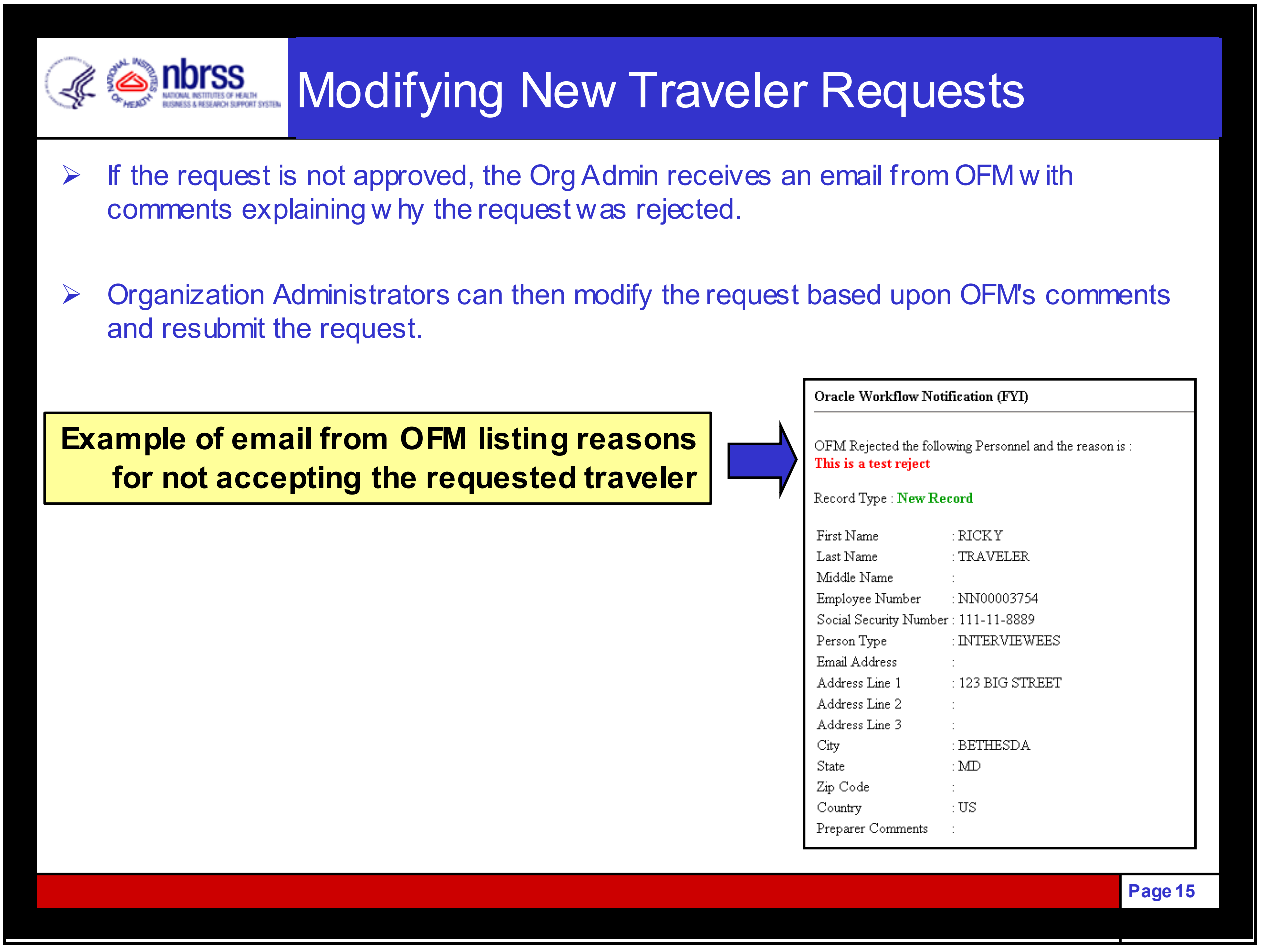


What if you get a Rejected Request?

Read and understand the reason for the rejections. Then modify the existing record in Oracle with the requested information and resubmit as an updated record. Do NOT create a new record for the person. For assistance with modifying an existing record refer to the Student Guide chapter on "Modifying New Traveler Requests."

End of activity.

Modifying New Traveler Requests

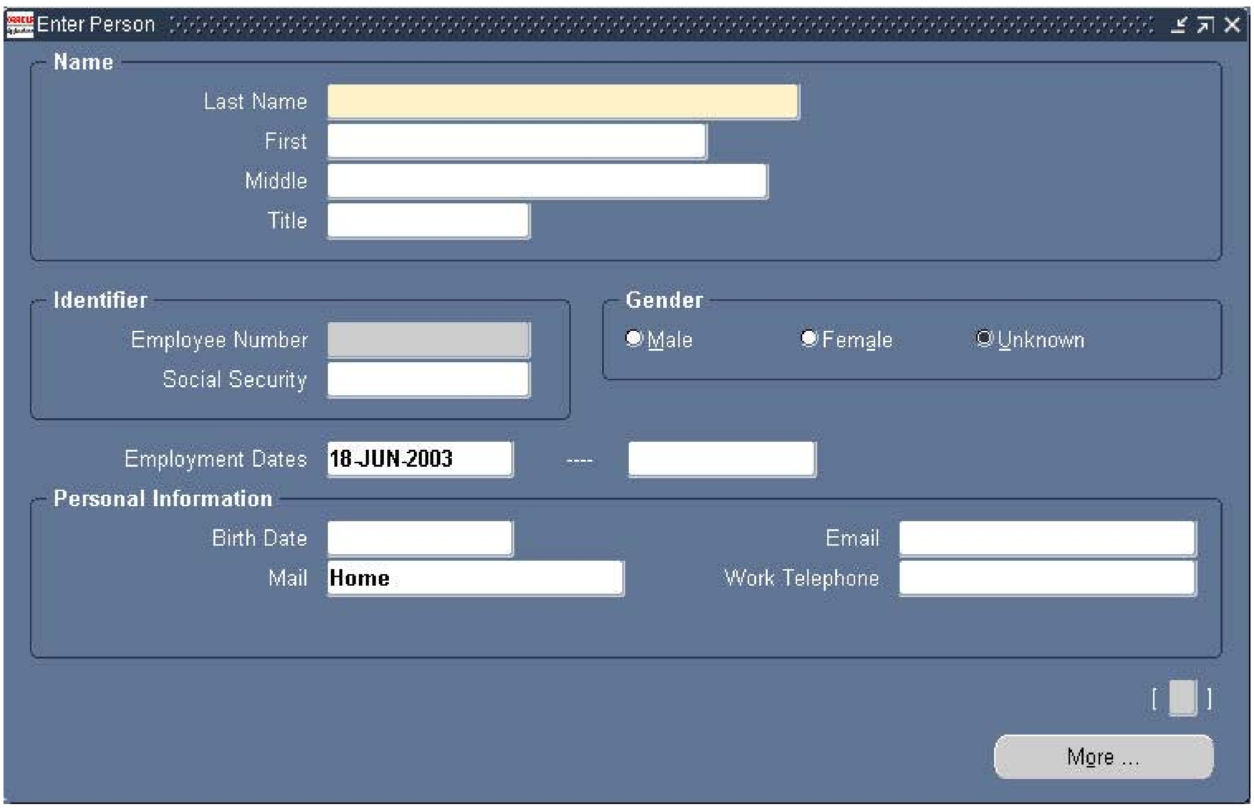


Modifying New Traveler Requests

NIH Baltimore Patient Entry User
N > Enter Person
Enter Person

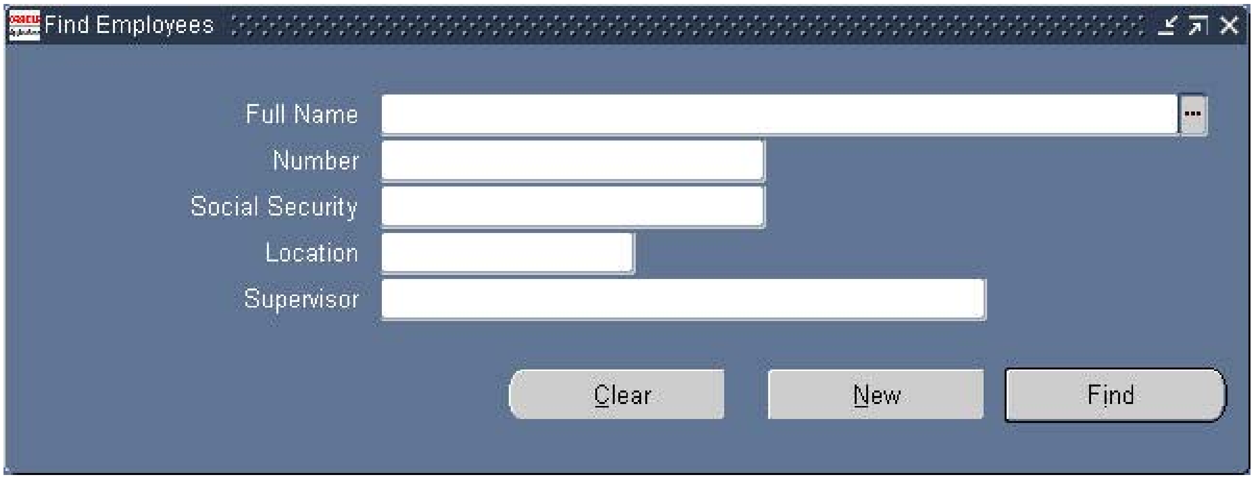
NIH Phoenix Patient Entry User
N > Enter Person
Enter Person

NIH Non Affiliates Entry User
N > Enter Person
Enter Person



1. Select the **Find**  button from the applications toolbar.

   Result: The **Find Employees** window is displayed.

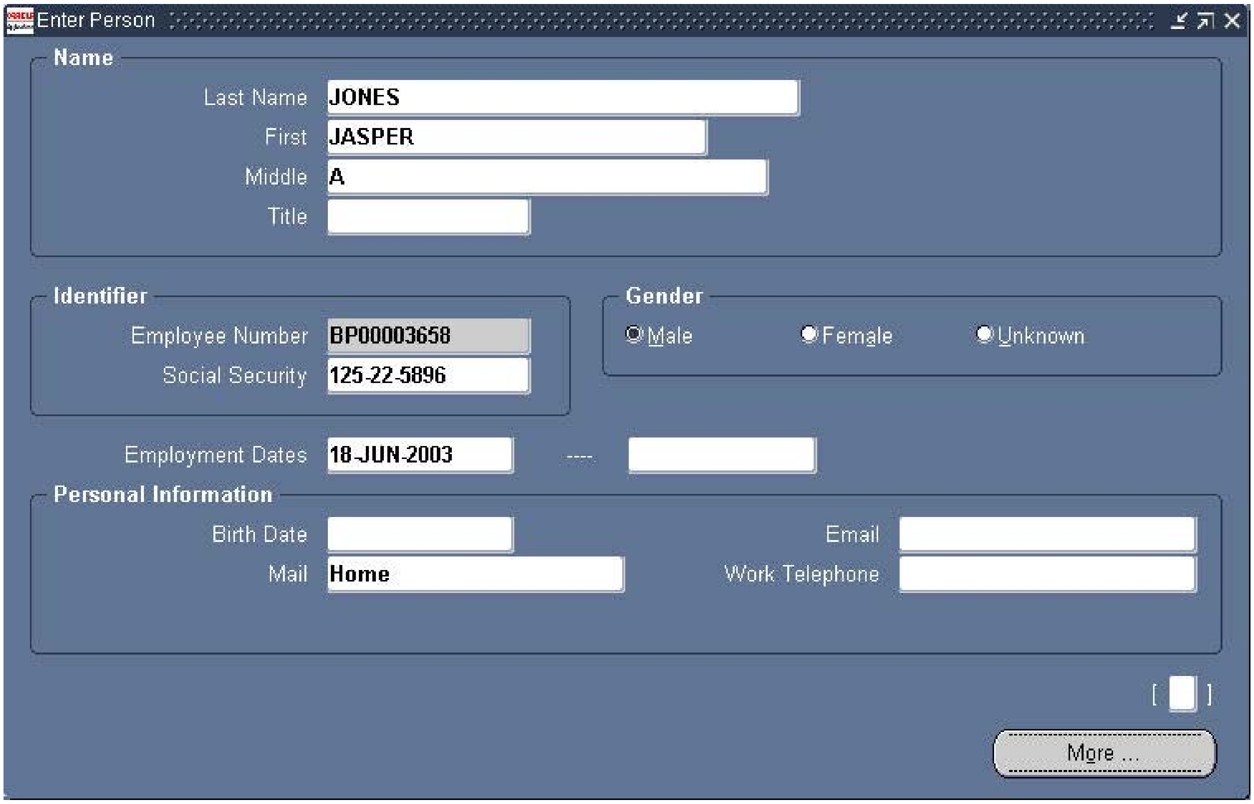


2. Enter the search criteria as described below:

Field	Description
Full Name	Select the person's full name from the **LOV**
Number	Enter the employee number or select it from the **LOV**.
Social Security	Enter the person's social security number or select it from the **LOV**.
Location	Enter the person's location or select it from the **LOV**.
Supervisor	The NIH currently does not use this field.

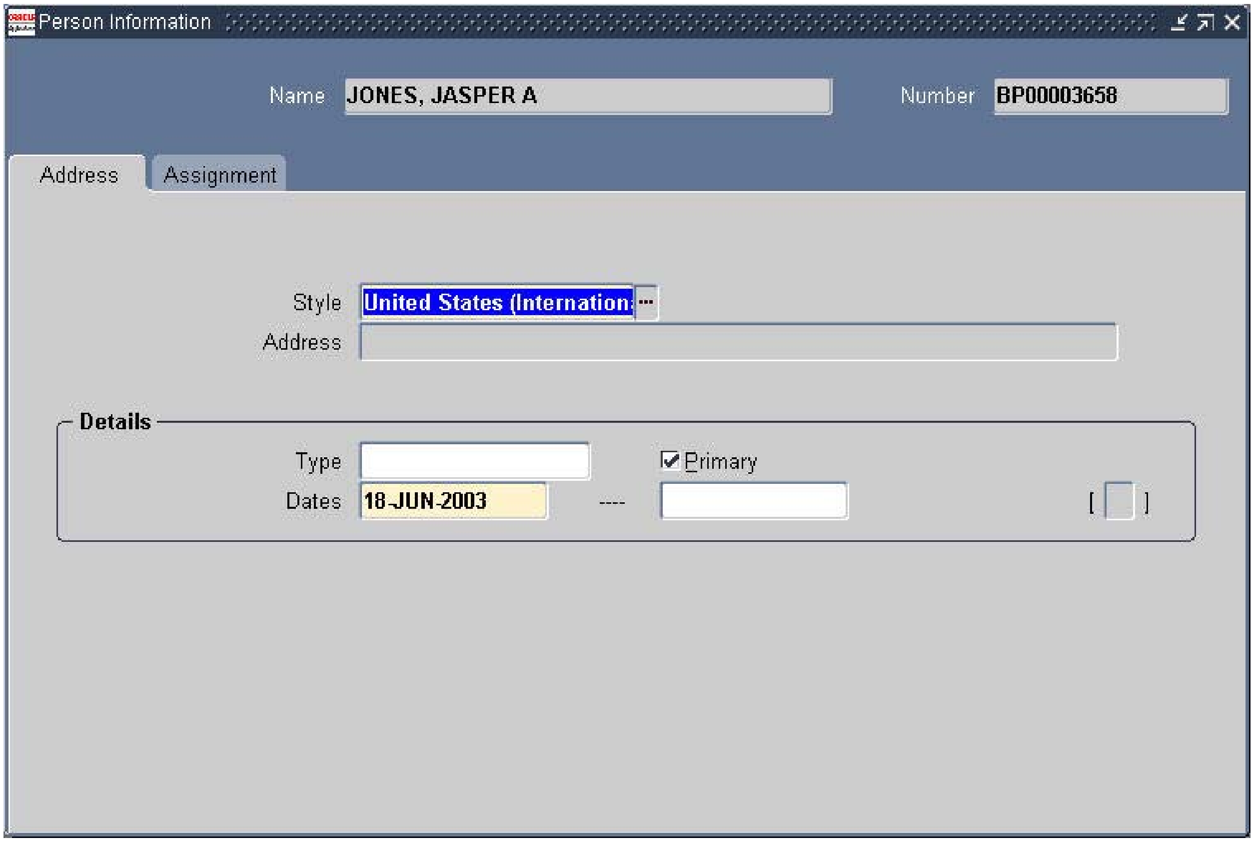
3. Select the **Find** button.

   Result: The record is displayed.



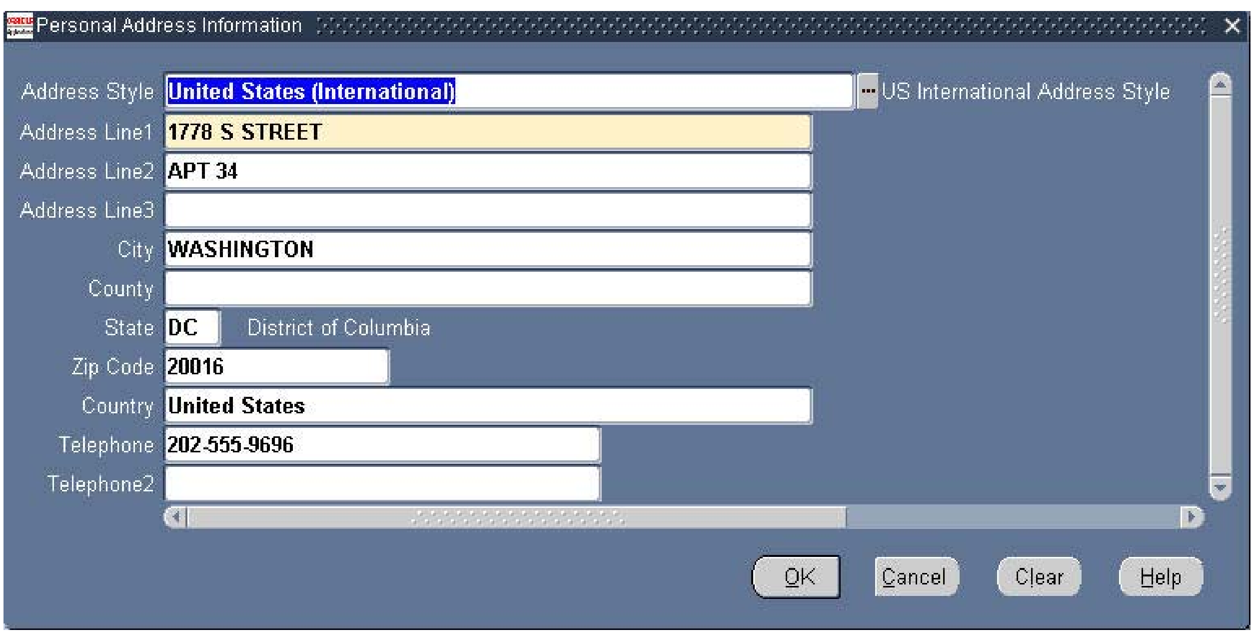
4. Modify the information on the **Enter Person** window as necessary.
5. Save your work.
6. Select the **More** button.

   <u>Result</u>: The **Person Information** window is displayed.



7. Place your cursor in the **Address** field.

   Result: The **Personal Address Information** window is displayed.



8. Modify the traveler's address and telephone information as described below.

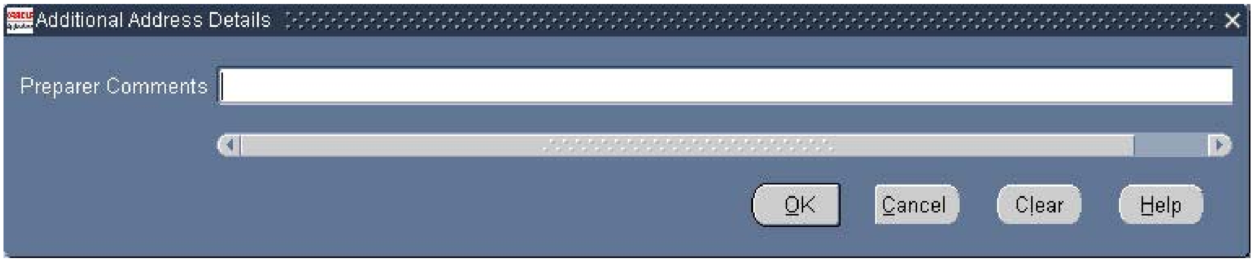
Field	Description
Address Style	Defaults to **United States (International)**
Address Line1	Enter the street address of the person
Address Line2	Enter additional street address information
Address Line3	Enter additional street address information
City	Enter the city information
County	Enter the county information
State	Select the state information from the **LOV**
Zip Code	Enter the zip code
Country	Select a country from the **LOV**
Telephone	Enter a telephone number for the person
Telephone2	Enter an alternative telephone number for the person

9. Select the **OK** button.

   Result: You are returned to the **Person Information** window.

10. Place your cursor in the **Flexfield []** located within the **Details** block.

    Result: The **Additional Address Details** window is displayed.



11. In the **Preparer Comments** field, enter additional comments on this record.

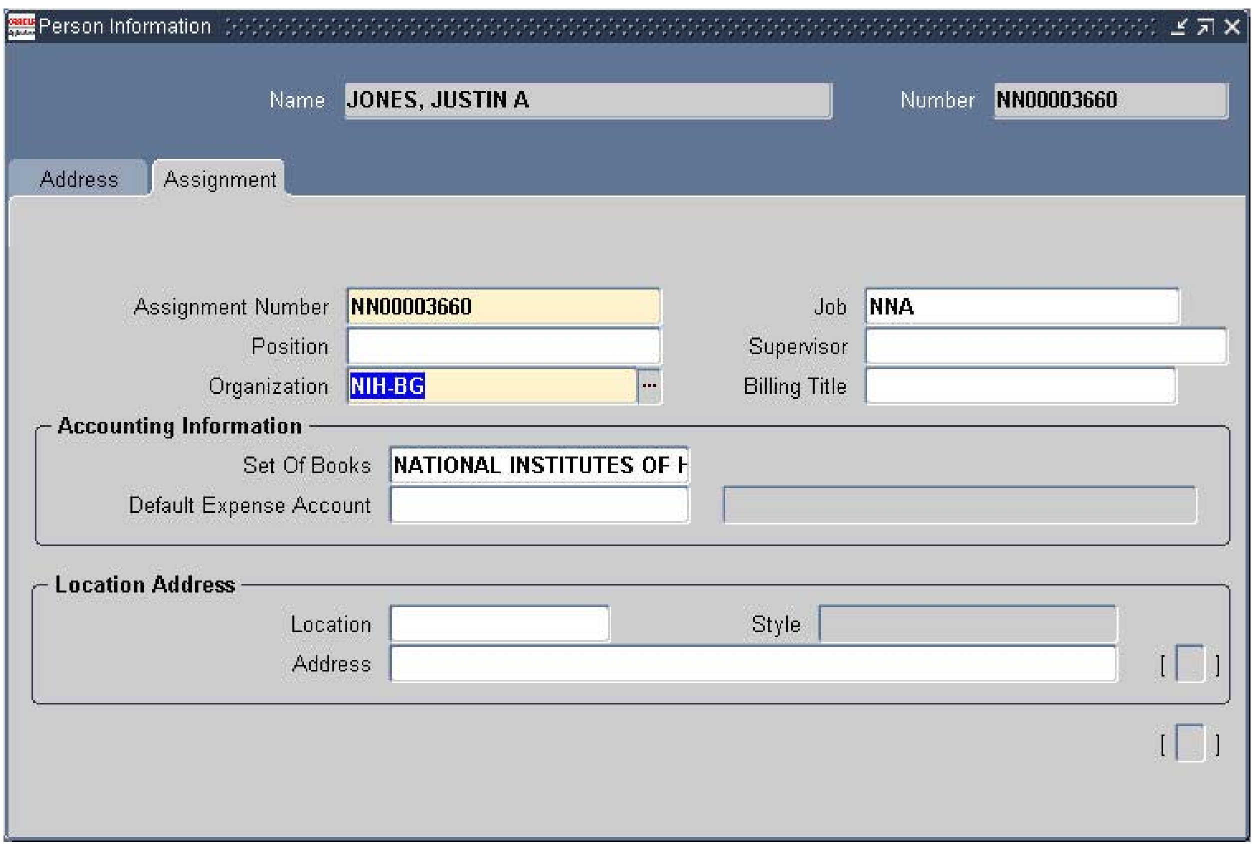
    Notes:
    – Describe the changes made to the traveler record.
    – The comments will be displayed in the email notification to OFM.
    – If the person does not have a SSN, then request a pseudo SSN number in this field.

12. Select the **OK** button.

    Result: The **Additional Address Details** window closes and you are returned to the **Person Information** window.

If changes to the organization are required, goto task #13. Otherwise, goto task #15.

13. Select the **Assignment** tab.

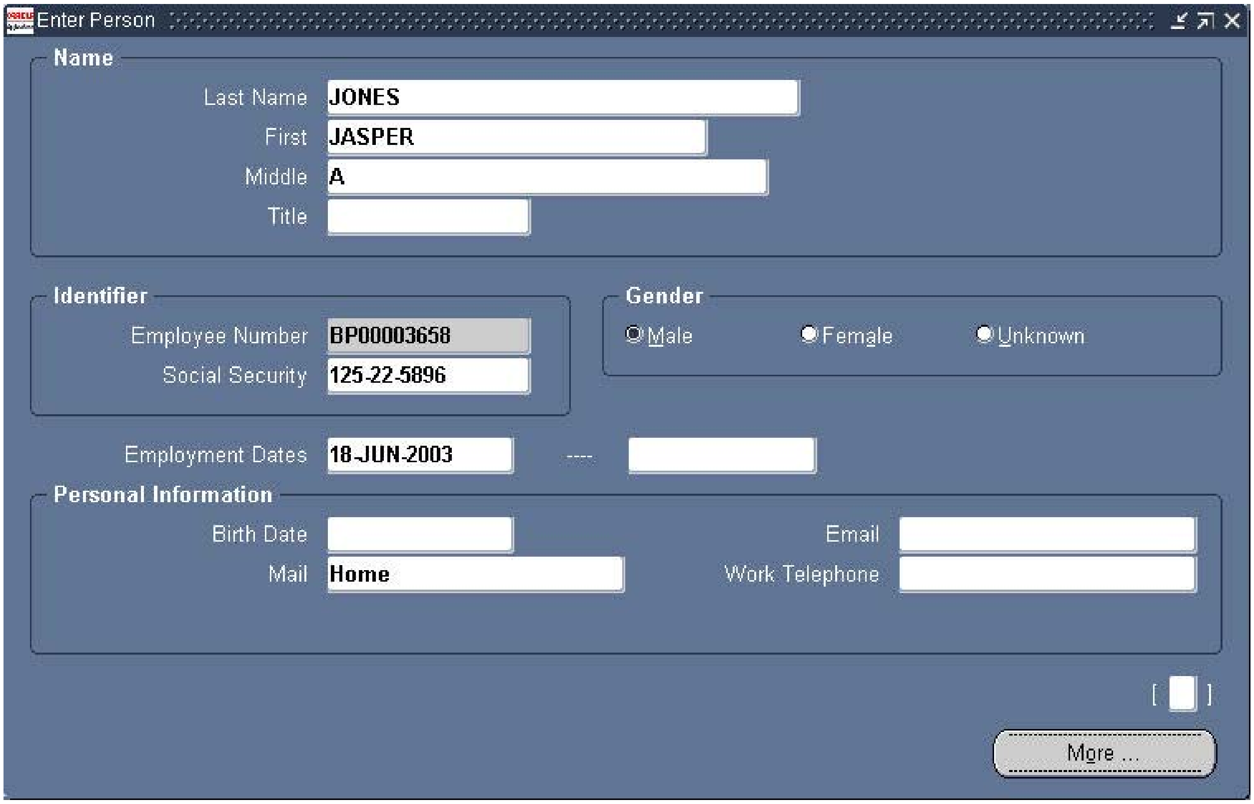


14. Tab to the **Organization** field and use the **LOV** to locate the correct organization.

15. Save your work.

16. Close the **Person Information** window.

    Result: The **Enter Person** window is displayed.



End of activity.

Adding Patient* Travelers to the NBS

* *This process applies to Bethesda Patients only.*

Adding a Patient Traveler

Medical Information System feeds patient's information into Patient Admissions and TMC

↓

Selected Clinical Center (SCC) staff enter the patient's information into Oracle HR

↓

Automatic process populates Oracle supplier tables 1

↓

Automatic process populates NBS Travel System "Traveler" tables 2

Review and Approval

Org Admin runs (or receives from SCC staff) the Oracle Apps report highlighting which Travelers have been added

↓

Org Admin accesses GTM Admin module and assigns routing list to traveler and completes traveler profile as necessary

Traveler Added to the NBS Travel System

Traveler's trip may now be entered into the NBS Travel System

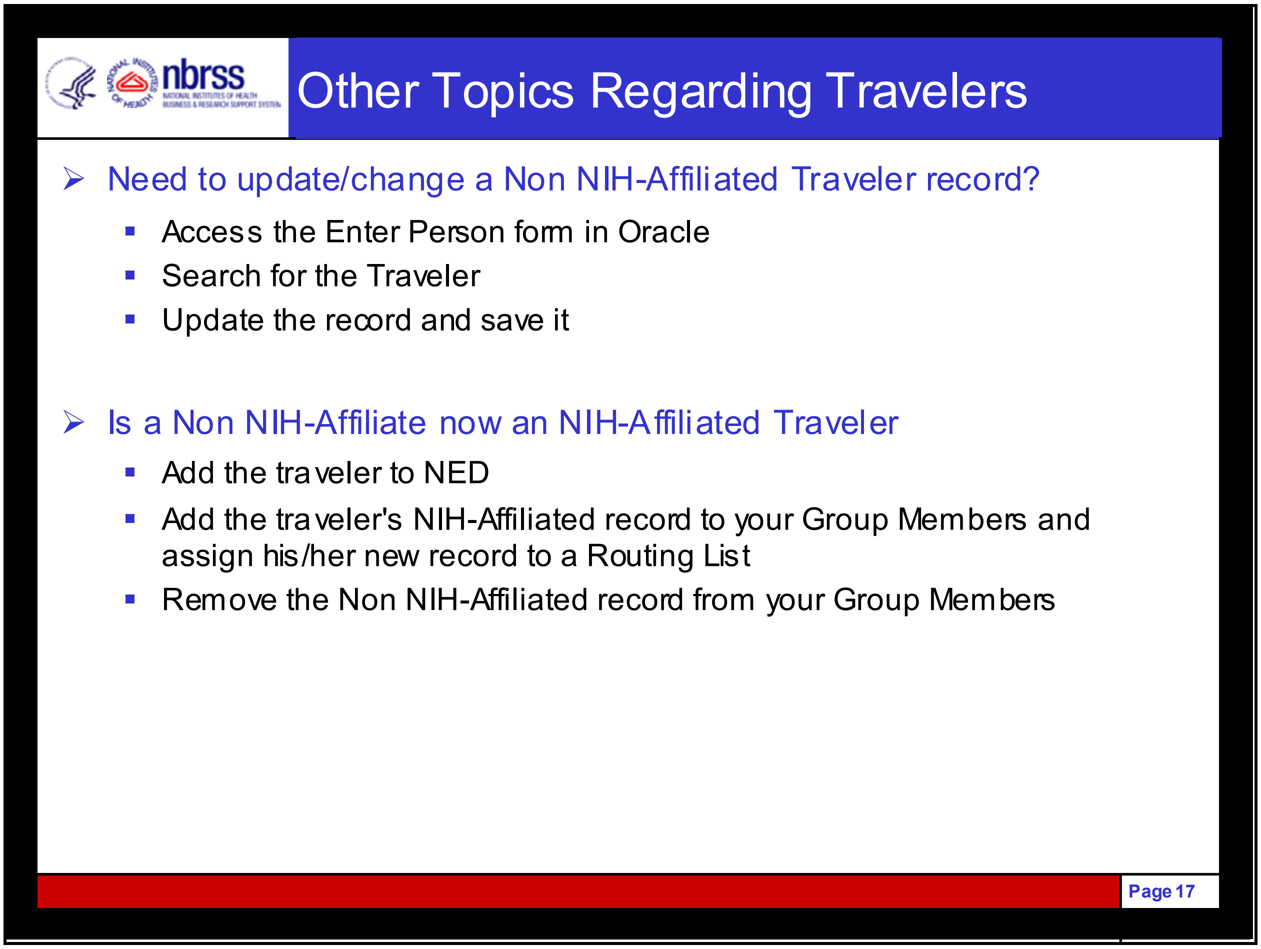
---

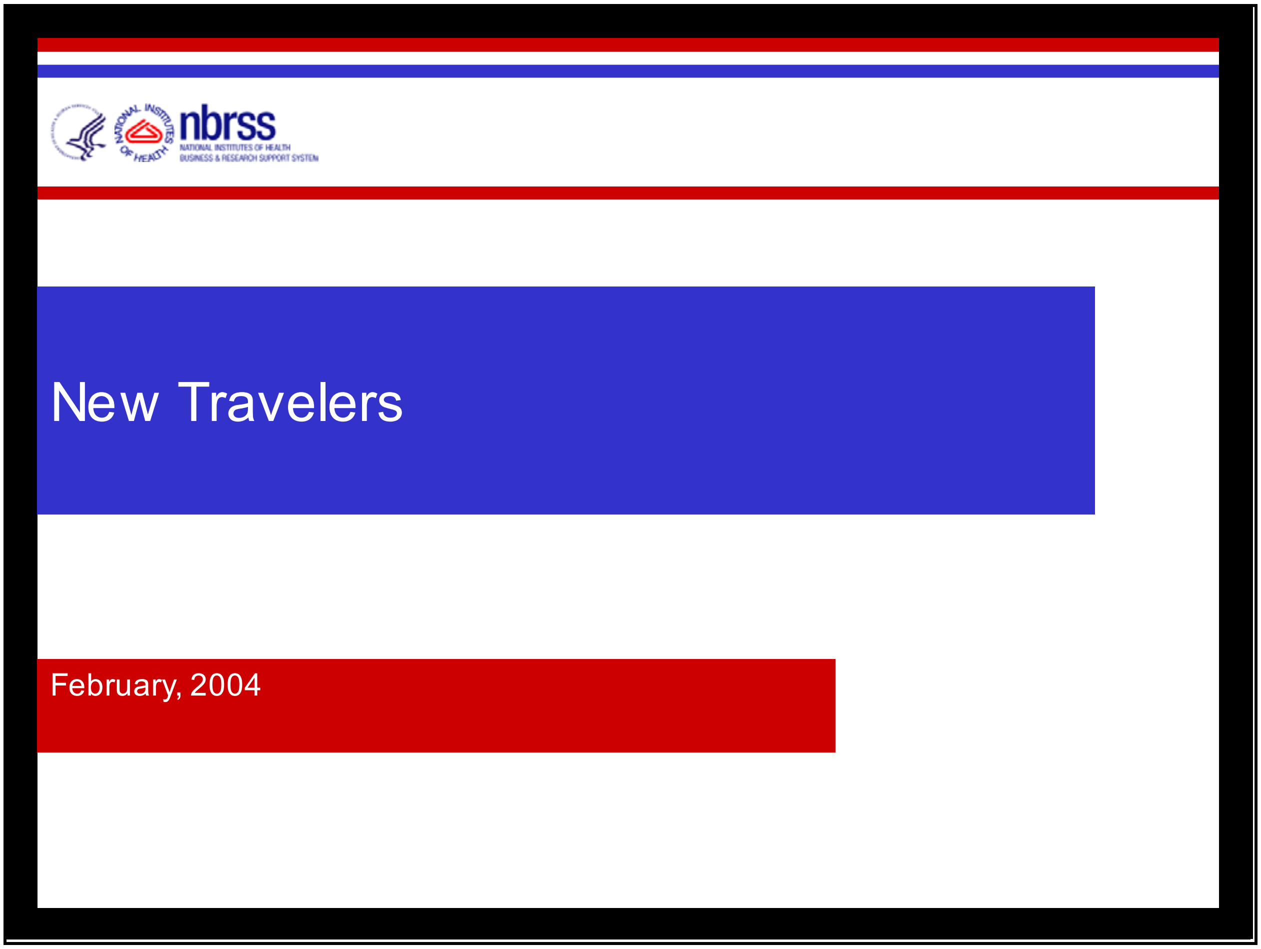
1 **Tip:** Manual Running of this Process

***Selected Clinical Center** staff may also run this report manually as well as run the Oracle Apps report. But the overall flow must remain in order; populate Oracle vendor tables first, then the NBS Travel System "Traveler" tables.*

2 **Tip:** Manual Running of this Process

*Clinical Center **Organization Administrators** may run this report manually. But the overall flow must remain in order; populate Oracle vendor tables first, then the NBS Travel System "Traveler" tables.*


nbrss
NATIONAL INSTITUTES OF HEALTH
BUSINESS & RESEARCH SUPPORT SYSTEM
Other Topics Regarding Travelers
Need to update/change a Non NIH-Affiliated Traveler record?
Access the Enter Person form in Oracle
Search for the Traveler
Update the record and save it
Is a Non NIH-Affiliate now an NIH-Affiliated Traveler
Add the traveler to NED
Add the traveler's NIH-Affiliated record to your Group Members and assign his/her new record to a Routing List
Remove the Non NIH-Affiliated record from your Group Members
Page 17


nbrss
NATIONAL INSTITUTES OF HEALTH
BUSINESS & RESEARCH SUPPORT SYSTEM
New Travelers
February, 2004

Lesson Objectives

Lesson Objectives

At the end of this lesson you should be able to:

- Submit the New Traveler Addition Audit Report.
- Enter a New Non-NIH Affiliated Traveler Request.
- Modify a New Non-NIH Affiliated Traveler Request.

Page 2


nbrss
NATIONAL INSTITUTES OF HEALTH BUSINESS & RESEARCH SUPPORT SYSTEM
Adding Travelers to the NBS Travel System
NIH-Affiliated Travelers
NIH Employees, Fellows, Consultants, and Contractors
Non NIH-Affiliated Travelers
Guest Speakers, Interviewees, Advisory Committee Members, and all other travelers without ability to electronically sign documents
➢ The Oracle Application will be used to identify new NIH-Affiliated Travelers and to request the addition of Non-NIH Affiliated Travelers.
Page 3

Accessing Oracle via the NIH Portal

Accessing Oracle via the NIH Portal

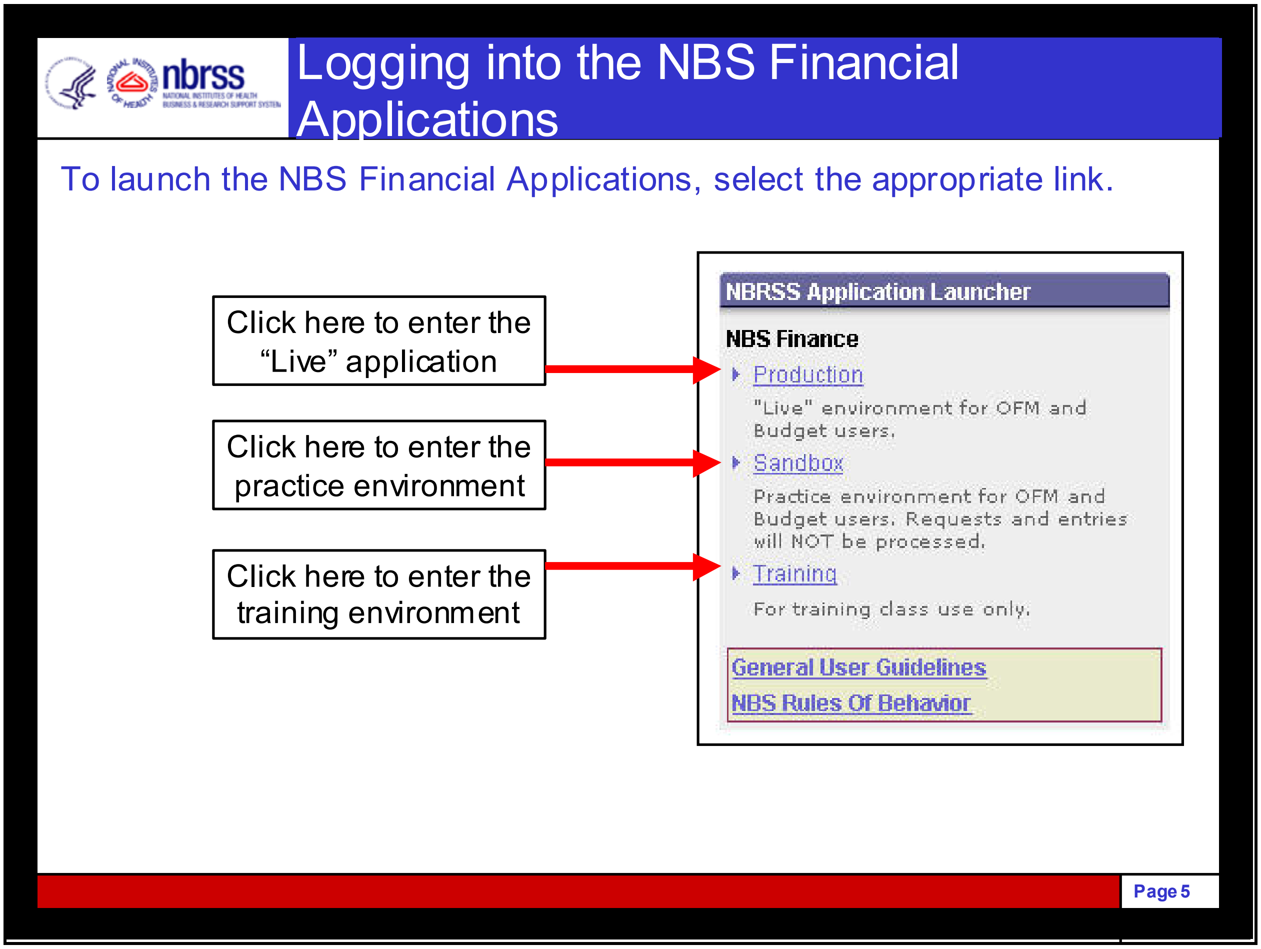
- Oracle is a web-based application available via the NIH Portal

- NIH Portal website: **http://my.nih.gov**
  - To Log on use your:
    - NIH Domain
    - User Name
    - Password
  - For assistance, contact NIH Help Desk at 6-HELP (301.496.4357).

- Add the Budget & Finance Community, which is the page where the Oracle application resides

Page 4

Logging into the NBS Financial Applications



Use the **Production** link to enter the live environment. Only use this link if you are going to perform real work in the system. You should not "practice" here.

Use the **Sandbox** link to enter a practice environment. This environment was created to allow you to practice your skills outside the training classroom. The information entered here will not affect the financial reporting of the NIH.

Use the **Training** link to enter the oracle application for use during training classes. Do not use this link if you are not in an instructor led class.

If you have never logged into Oracle before it will be necessary to install the JINITIATOR prior to logging in. The instructions for doing so follow. Otherwise you may go directly to the section titled "Accessing the Oracle Application" to log in.

Oracle JINITIATOR Installation Instructions

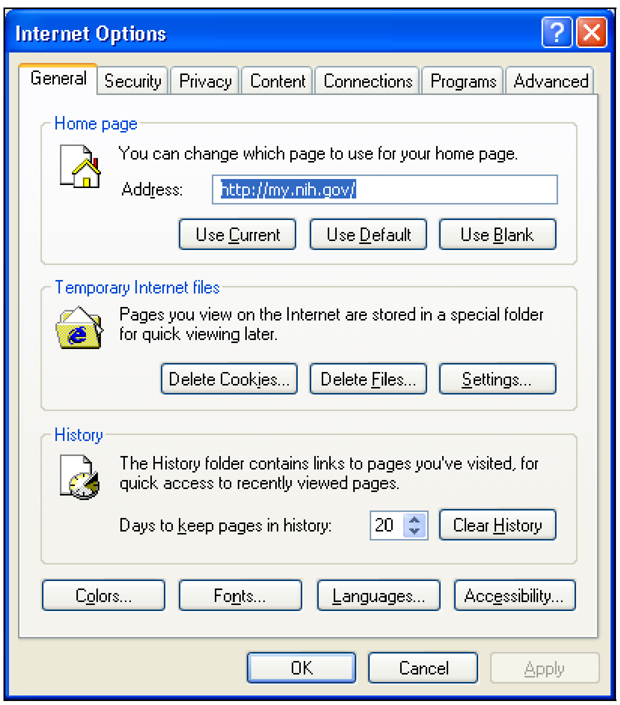
Before you begin:

This document contains instructions for installing Oracle JInitiator using Internet Explorer.
NOTE: Internet Explorer is the recommended browser for the NBS.

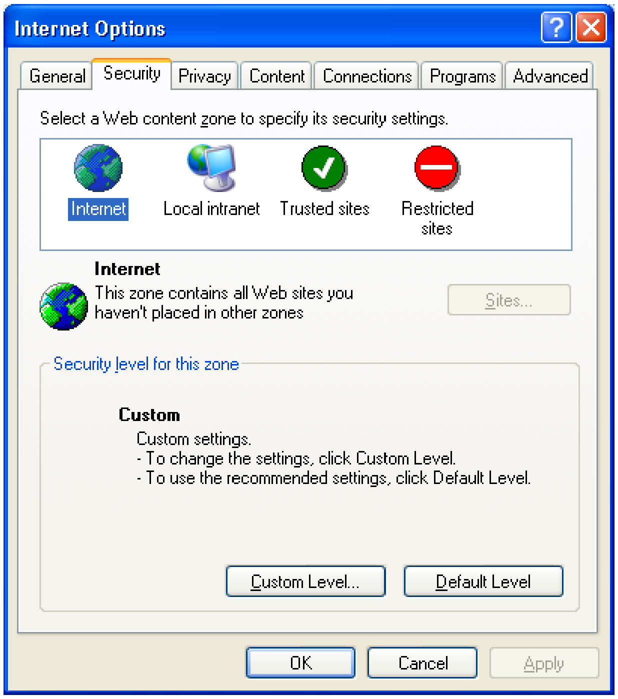
If you have questions or need assistance, please contact your local IT representative, or the NIH Help Desk (301-496-4357).

1. Open Microsoft Internet Explorer (IE).

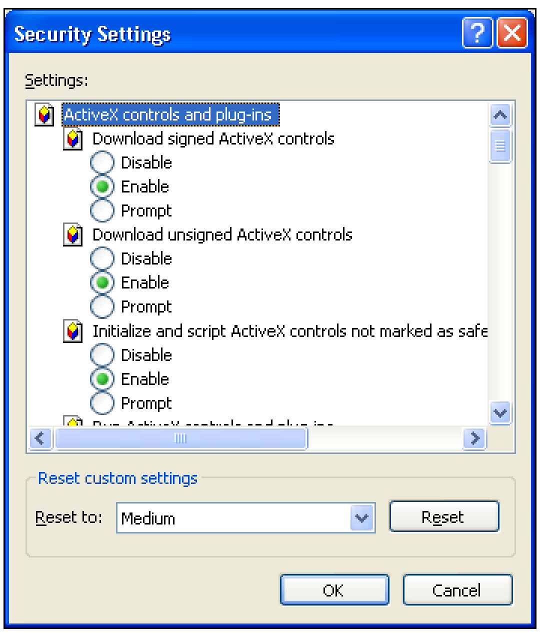
2. In the IE window select Internet Options from the Tools menu.



3. In the Internet Options window, select the **Security** tab.

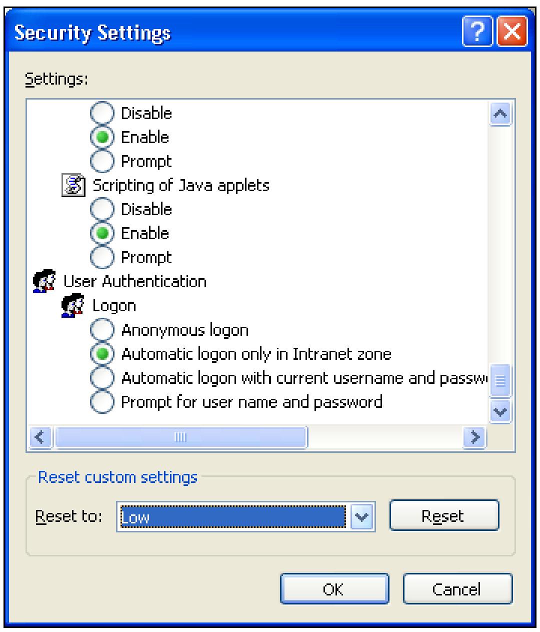


4. Select **Custom Level** button.



5. In the Security Settings window, click the **Enable** button next to the following settings:
   - Download signed ActiveX controls
   - Download unsigned ActiveX controls
   - Initialize and script ActiveX controls not marked as safe
   - Run ActiveX controls and plug-ins
   - Scripts ActiveX controls marked safe for scripting
   - Downloads > File download
   - Downloads > Font download

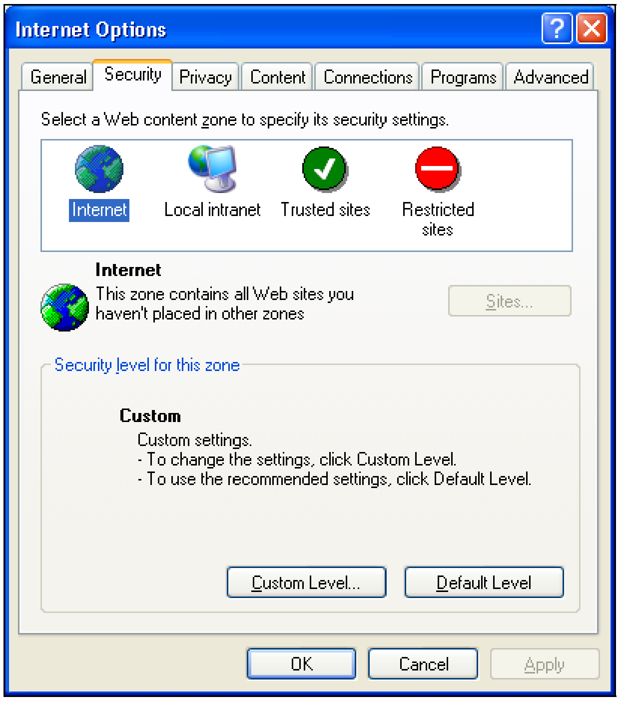
– Microsoft VM > Java permissions > Low safety
– Miscellaneous > Access data sources across domains
– Miscellaneous > Allow META REFRESH
– Miscellaneous > Display mixed content
– Miscellaneous > Don't prompt for client certificate selection when no certificates or only one certificate exists
– Miscellaneous > Drag and drop or copy and paste files
– Miscellaneous > Installation of desktop items
– Miscellaneous > Launching programs and files in an IFRAME
– Miscellaneous > Navigate sub-frames across different domains
– Software channel permissions
– Submit nonencrypted form data
– Userdata persistence
– Scripting > Active scripting
– Scripting > Allow paste operations via script
– Scripting > Scripting of Java applets



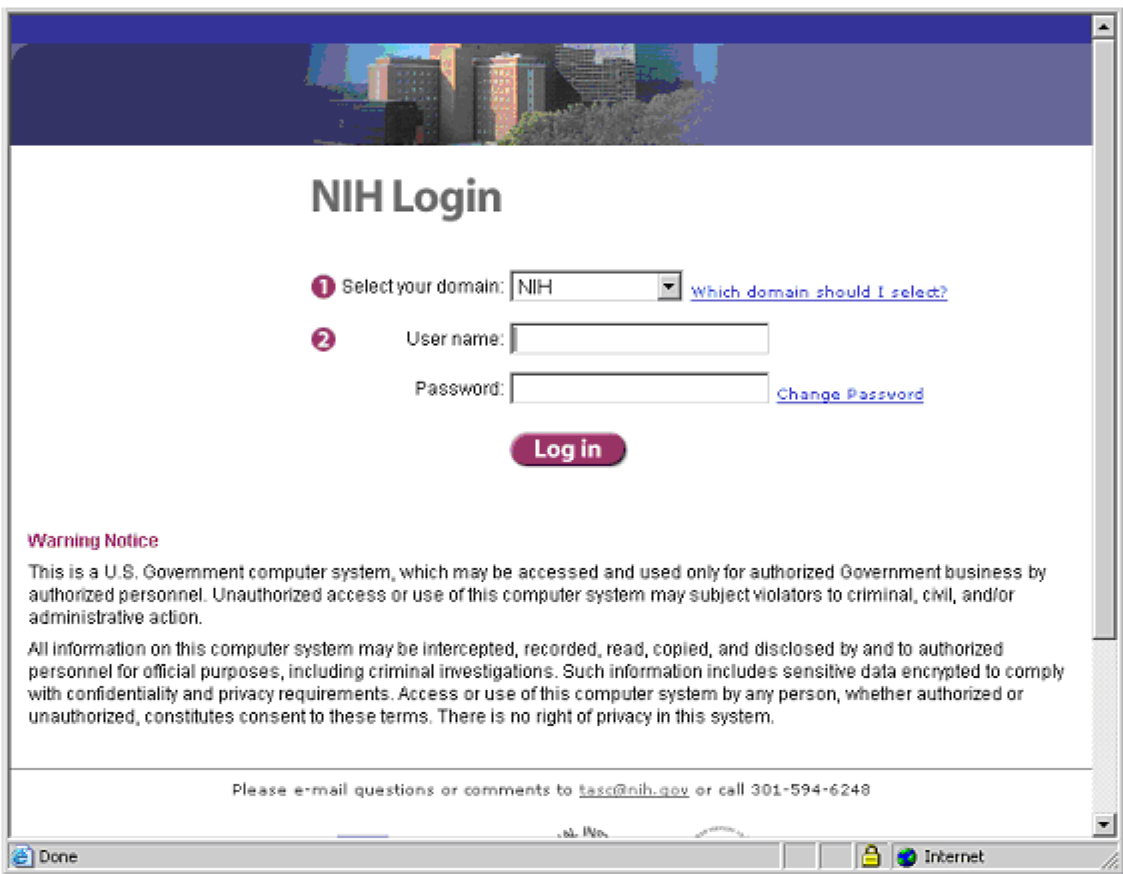
6. Change the Reset custom settings to Low.

7. Click the **OK** button.

8. Click the Yes button.



9. Click the OK button to exit.



10. In the IE browser window that is open on your desktop, log in to the NIH Portal: http://my.nih.gov with the same Domain, User name and Password you use to log in to your workstation computer.

11. Go to the Budget/Finance Community on the NIH Portal.

If you need to add the Budget and Finance Community, goto task #12. Otherwise, goto task #13.

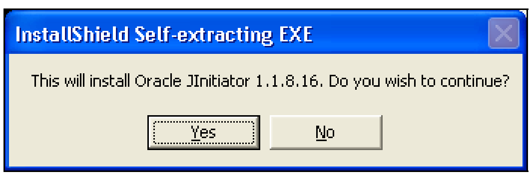
12. To add the Budget/Finance Community to your NIH Portal page:
    - Select the **Communities** tab in the top left portion of the NIH Portal screen.
    - Select **Edit Your Memberships** from the drop down menu.
    - Select the **NBRSS** folder (near the middle of the screen).
    - Select the checkbox for the **NBRSS Budget/Finance** community.
    - Select **Add to My Memberships**.
    - In the top right portion of the same screen, select Finish.

13. To access the NBRSS Budget/Finance community page, select the **Communities** tab and select **NBRSS Budget/Finance** from the drop down menu.

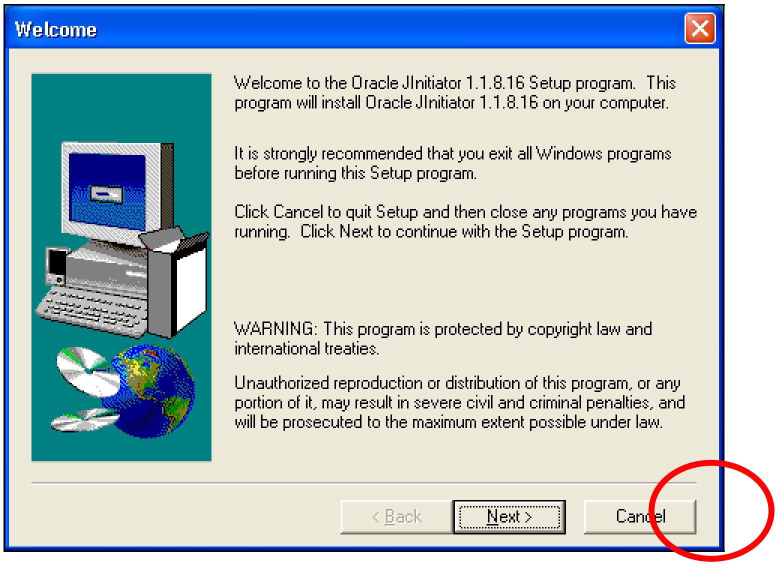
14. In the NBRSS Application Launcher section of the community page, select the **Production** link to access Oracle.

15. Under **Applications**, select a responsibility.

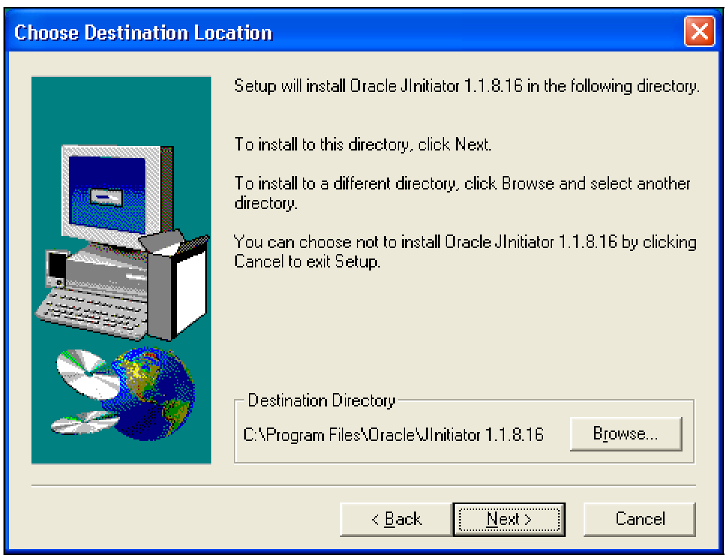
    Result: JInitiator will download files from the server to the client.



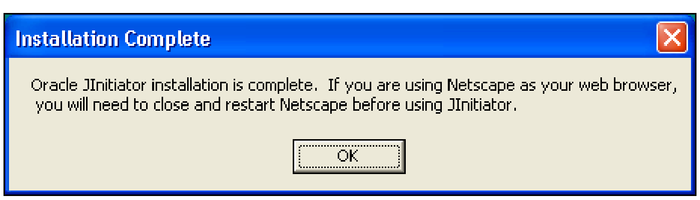
16. Select the Yes button.



17. Select **Next** on the Welcome screen.



18. Select **Next** in the Choose Destination Location window.

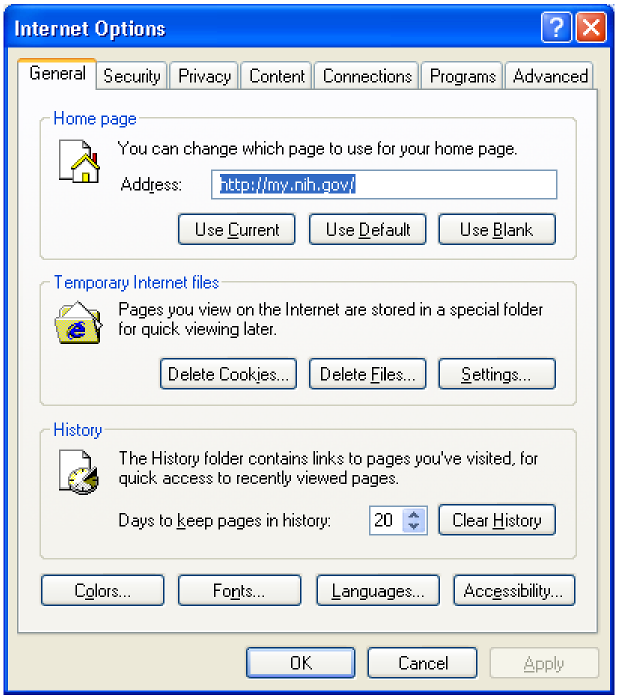


19. Click **OK** once installation is complete.

Result: You are now logged into Oracle with the responsibility you selected earlier in these instructions.

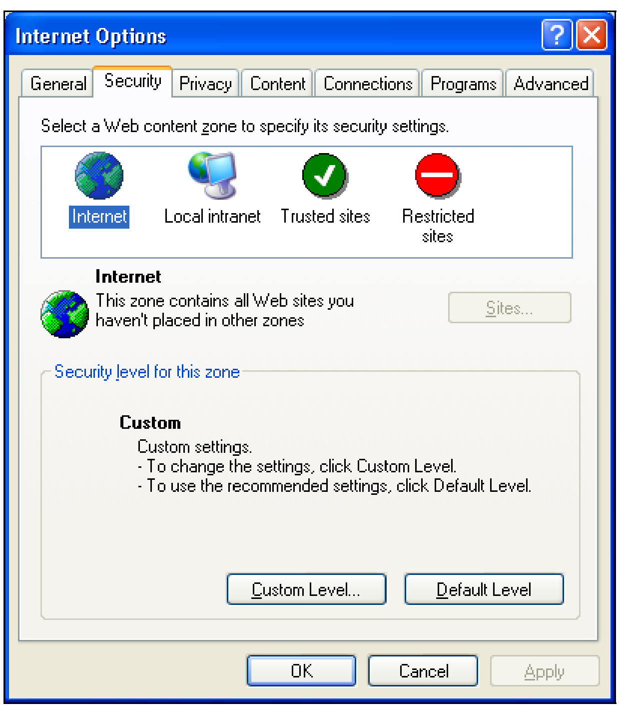
After Installation

20. To reset your IE browser defaults go to the Microsoft Internet Explorer window that is open on your desktop.



21. In the IE window select Internet Options from the Tools menu.

22. Select **Security** tab.



23. Select **Default Level** button.

24. Click **Apply.**

25. Click **OK**.

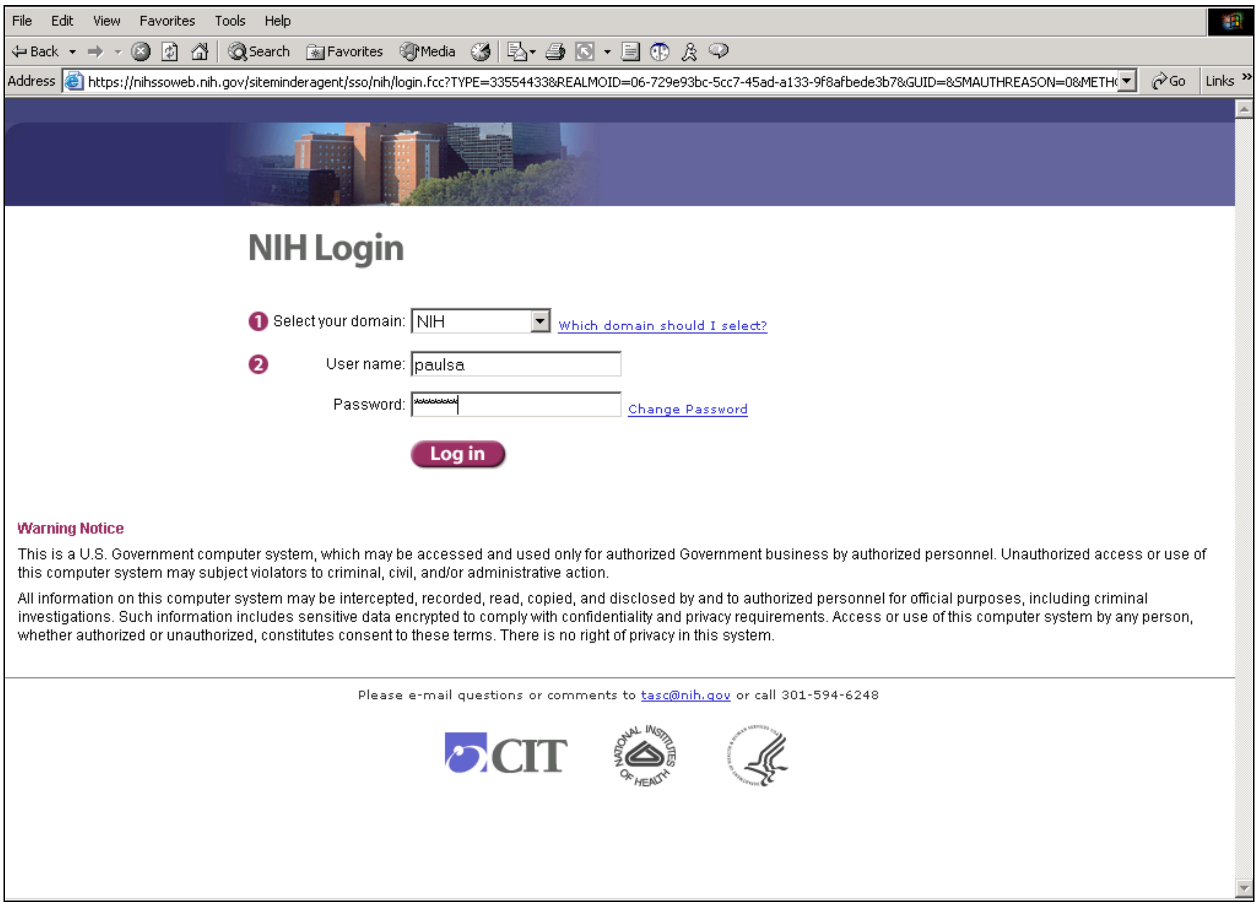
Accessing the Oracle Application

Organization Administrator

N> http://my.nih.gov

NIH Portal

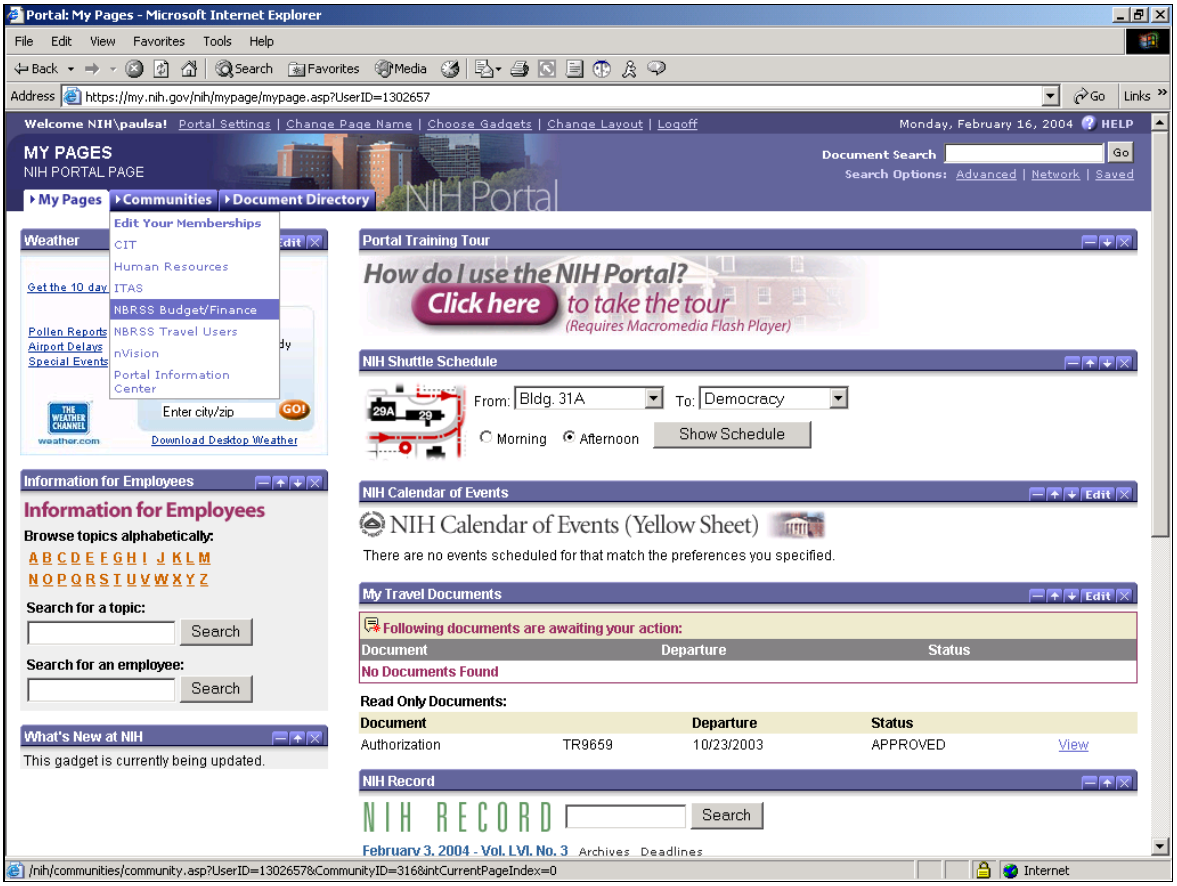
1. Enter the NIH Portal using the web address of your Internet browser.



2. Complete the NIH Login Information:

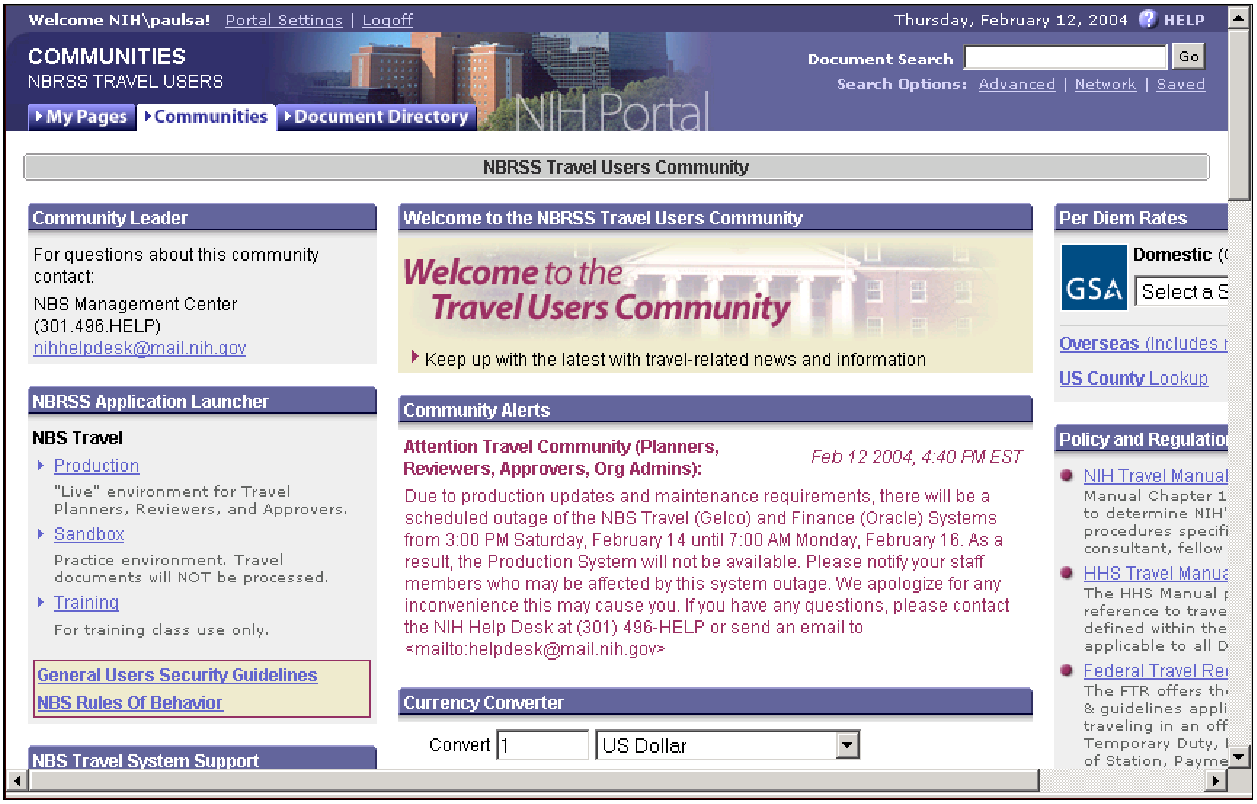
- Select your **Domain** from the drop down menu.
- Enter your **User name**.
- Enter your **Password**.
- Select **Log in**.

Note: Your domain, user name and password are the same information you use to log on to your computer workstations. If you need assistance logging in to the NIH Portal or do not know your domain, user name or password, contact TASC at 301.496-4357.



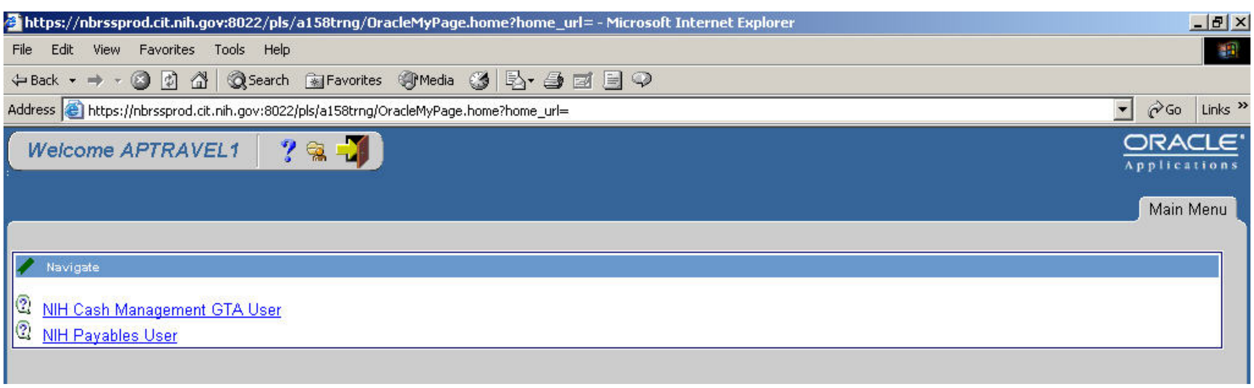
3. From the Communities pull down menu at the top of the page, select **NBRSS Budget/Finance***.

- To add the Budget/Finance Community:
  - Select the Communities tab.
  - Select Edit Your Memberships.
  - Select the NBRSS folder.
  - Select the checkbox for NBRSS Budget/Finance.
  - Select Add to my Memberships.
  - Click Finish.



4. From the NBRSS Budget/Finance Community, select the **NBS Finance Production** link in the NBRSS Application Launcher section in the top left corner.

   <u>Result:</u> Oracle Applications launches.

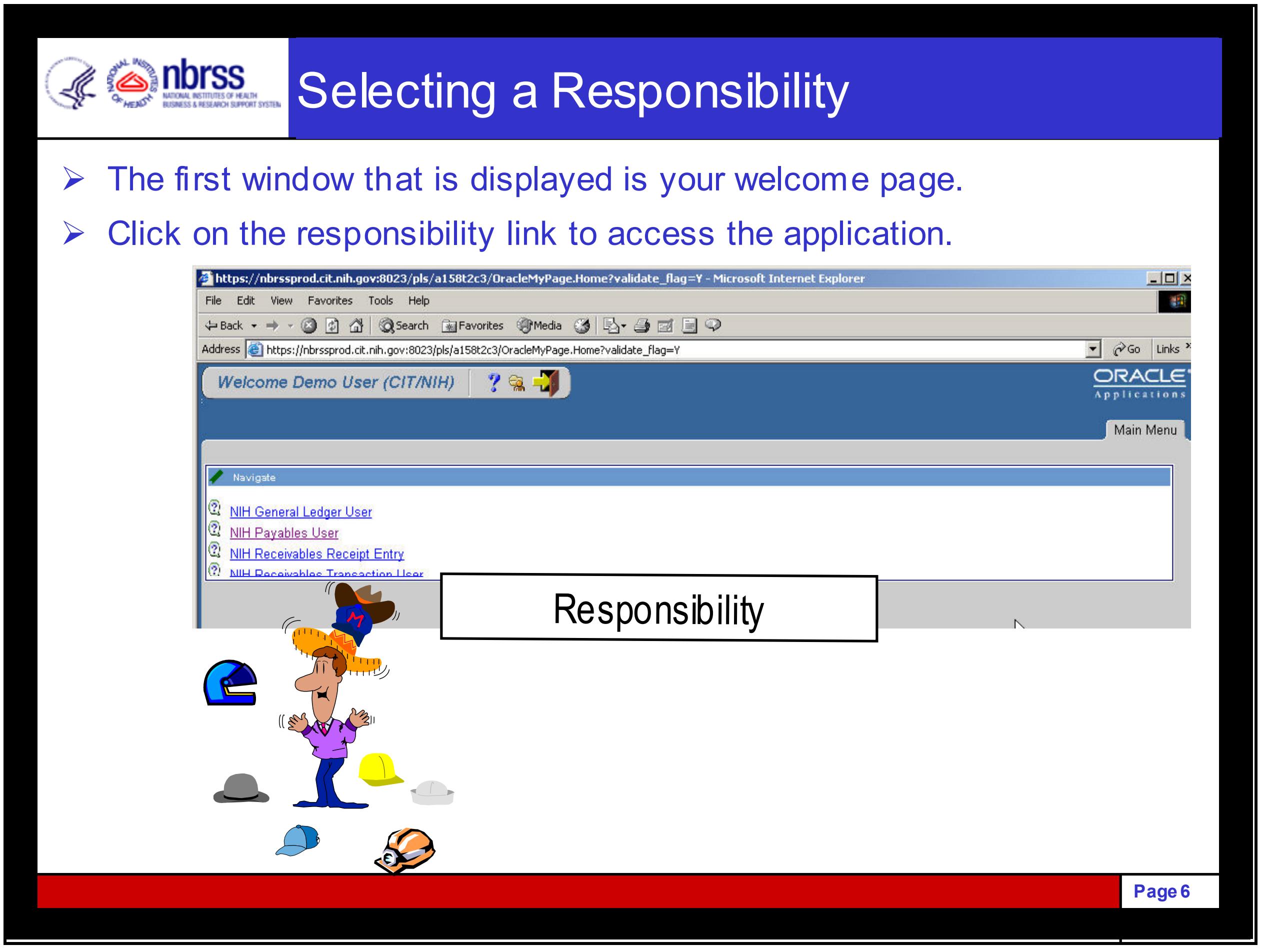


5. Select the responsibility that you want to access.

   <u>Result</u>: The **Oracle J-Initiator** window appears followed by the **Oracle Applications** window.

End of activity.

Selecting a Responsibility



Selecting a Responsibility

Once you have used the logon form to begin the logon process, you must tell the system what type of access you will be using. A *responsibility* is a set of data, menus, and forms that defines your particular level of authority while using the system.

Responsibility Assignments

The Organization Administrator will use the following responsibilities depending on the type of user being added:

NIH Non Affiliates Entry User -- for Non NIH Affiliated travelers

NIH Baltimore Patient Entry User -- for Baltimore Patient travelers

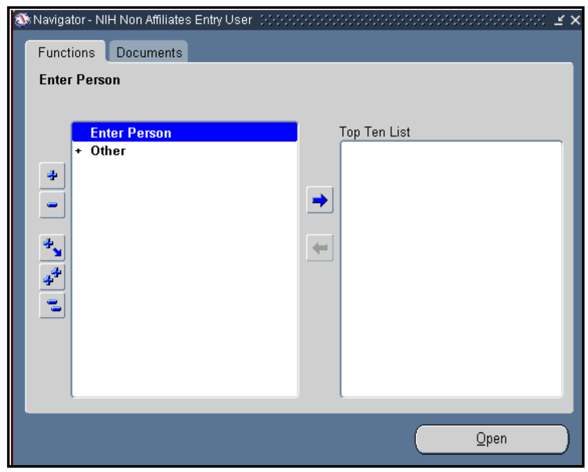
NIH Phoenix Patient Entry User -- for Phoenix Patient travelers

Each user has at least one responsibility and several users can share the same responsibility. If you have only one responsibility with one function, and only one region on your Personal Homepage, you will go directly to that function. If you have multiple responsibilities, select the underlined link in the Application section to select the desired responsibility. Once you click on the link, you will have an opportunity to change responsibilities, if necessary.

NIH Non Affiliates Responsibility

NIH Non Affiliates Responsibility

- All Organization Administrators will see the screen below for the NIH Non Affiliates Responsibility
  - Select **Enter Person** to request a new Non NIH-Affiliated traveler or to modify a current record
  - Select **Other** to Run the New Traveler Addition Audit Report



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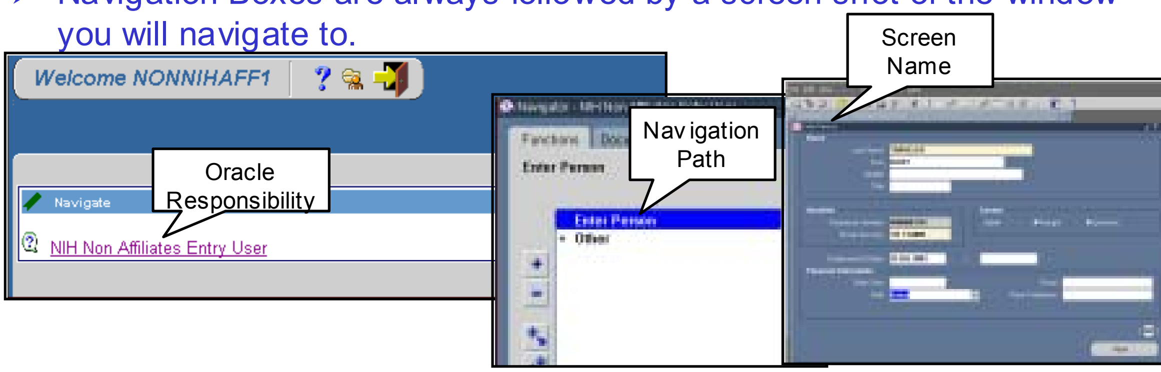
How to Use the Step by Step Instructions

- Navigation Boxes within the step-by-step instructions describe how to get to the appropriate screen in Oracle to perform the task

NIH Non Affiliates Entry User	***Oracle Responsibility***
N > Enter Person	***Navigation Path***
Enter Person	***Screen Name***

- Navigation Boxes are always followed by a screen shot of the window you will navigate to.



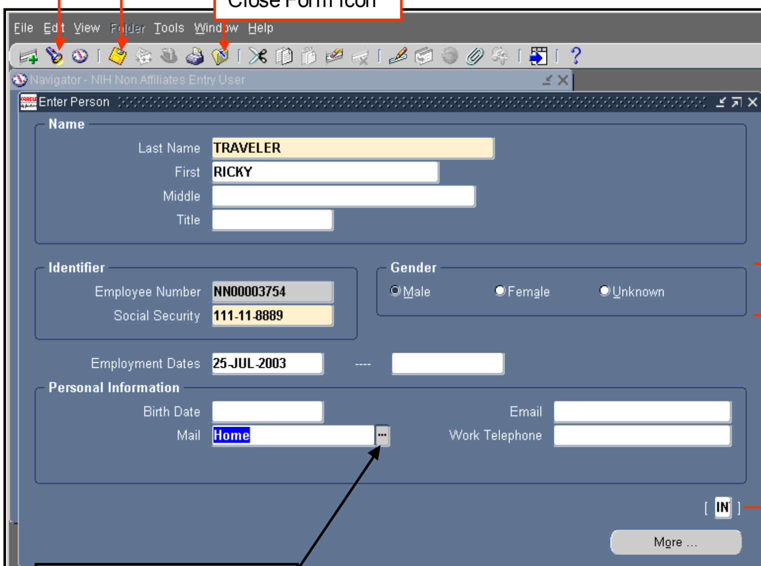
Page 8

Org Admin - Oracle Window Basics

Find icon

Save icon

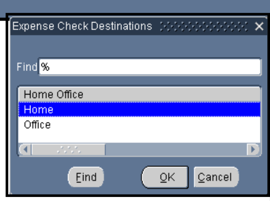
Close Form icon



Field Colors	
Field Color	Description (attributes of the field)
White	Allows data entry
White w/ green text	Indicates drill-down capability
Beige	Requires data entry
Gray w/ black text	Display only
Blue	Indicate fields to use in Query Enter mode

Block: A block is just a named bordered section within a window (e.g. Gender block).

Flexfield: Opens a separate window that contains customized NIH-specific selection information (e.g. Additional Personal Details window for entering Employee Type).



LOV (List of Values) icon: If you select a field and the LOV icon appears to the right of the field, that means a list of acceptable input values is available. When you select the LOV icon to display a list, the values appear in a window with a title that describes the contents.

Shortcut Keys in Oracle

Function/Purpose	Key
Clear Form	F8
Clear Record	F6
Enter Query	F11
Execute Query	Ctrl + F11
Exit	F4

Field Colors in Oracle

- Field colors indicate the attributes of the field.

Field Color	Description
White	Allow data entry
White with Green Text	Indicate drill-down capability
Yellow	Require data entry
Gray with black text	Are display only
Blue	Indicate fields to use in Query-Enter mode

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What Field Colors Indicate

Each block contains fields you use to enter, view, update, or delete information. A field prompt describes each field by telling you what kind of information appears in the field or what kind of information you should enter in the field. Fields are color coded to indicate their type as follows:

White Fields—allow data entry

White Fields with Green Text—indicate drill-down capability

Yellow Fields—require data entry

Gray Fields with Black Text—are display-only

Blue Fields—indicate fields to use in Query-Enter mode

The term field generally refers to a text field, an area in a window that either displays data or allows you to enter data. However, a field can also include a button, check box, option group, or poplist.

New Traveler Addition Audit Report

NIH-Affiliated Travelers

NIH Employees, Fellows, Consultants, and Contractors

- The NIH Enterprise Directory (NED) and Human Resource Data Base (HRDB) systems automatically transfer new Traveler data to the NBS every two weeks*
- Run the New Traveler Addition Audit Report in Oracle
  - Identifies new NIH-Affiliated Travelers that have been added to the system
- The Organization Administrator (Org Admin) completes the Traveler Profile in the GTM Admin 8.1 Module, as necessary

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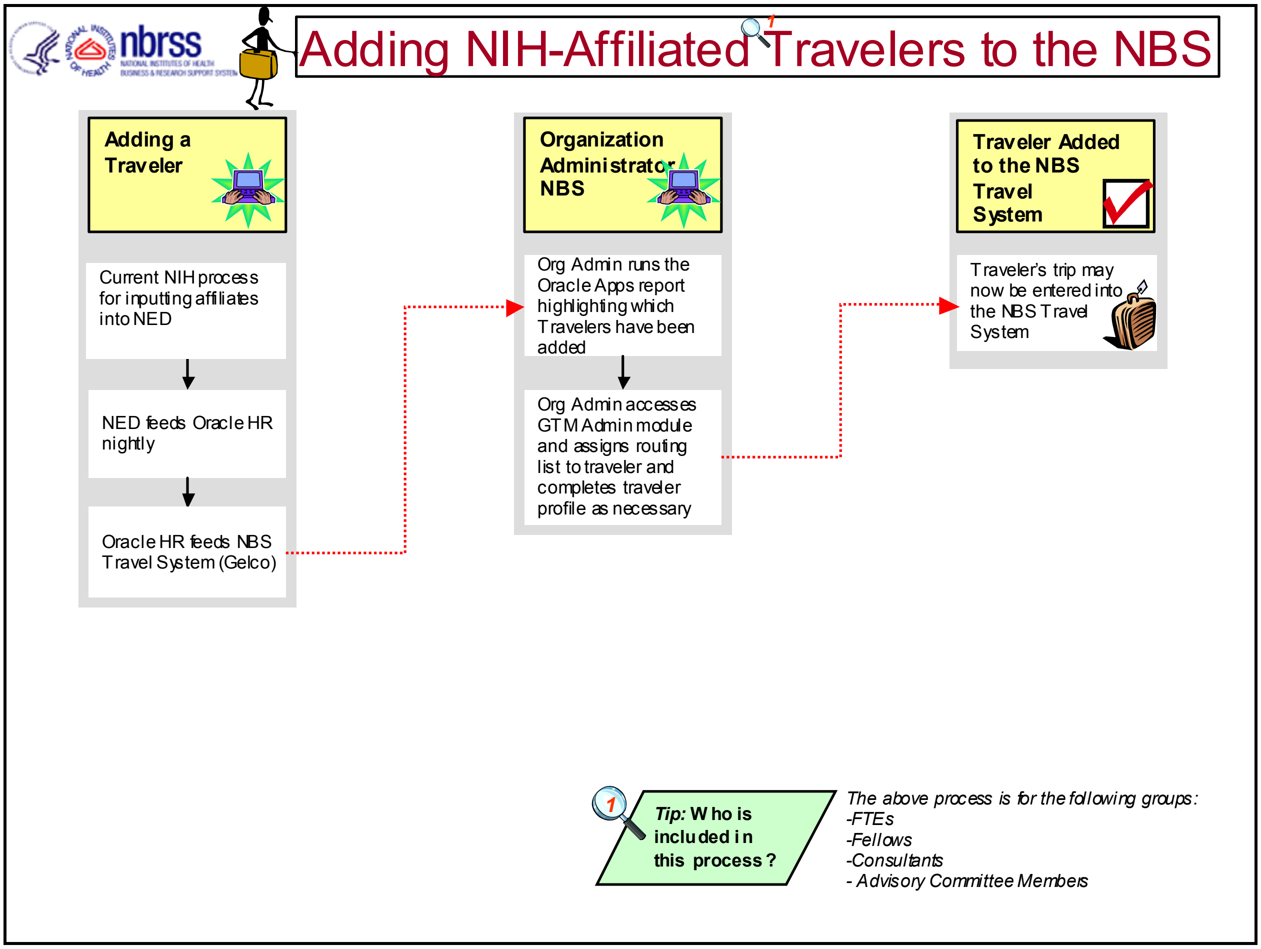
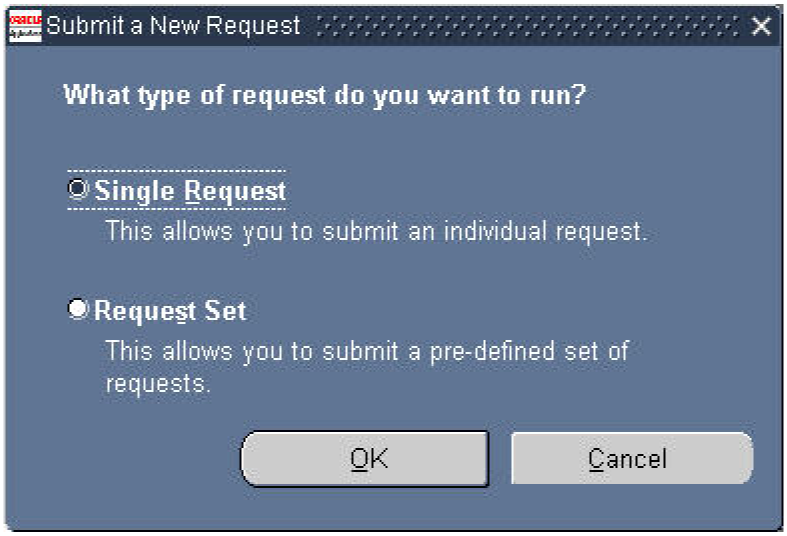

Adding NIH-Affiliated Travelers to the NBS
Adding a Traveler
Current NIH process for inputting affiliates into NED
NED feeds Oracle HR nightly
Oracle HR feeds NBS Travel System (Gelco)
Organization Administrator NBS
Org Admin runs the Oracle Apps report highlighting which Travelers have been added
Org Admin accesses GTM Admin module and assigns routing list to traveler and completes traveler profile as necessary
Traveler Added to the NBS Travel System
Traveler's trip may now be entered into the NBS Travel System
Tip: Who is included in this process?
The above process is for the following groups:
-FTEs
-Fellows
-Consultants
- Advisory Committee Members

Submitting the New Traveler Addition Audit Report

NIH Non Affiliates Entry User
N > Requests > Run
Submit a New Request

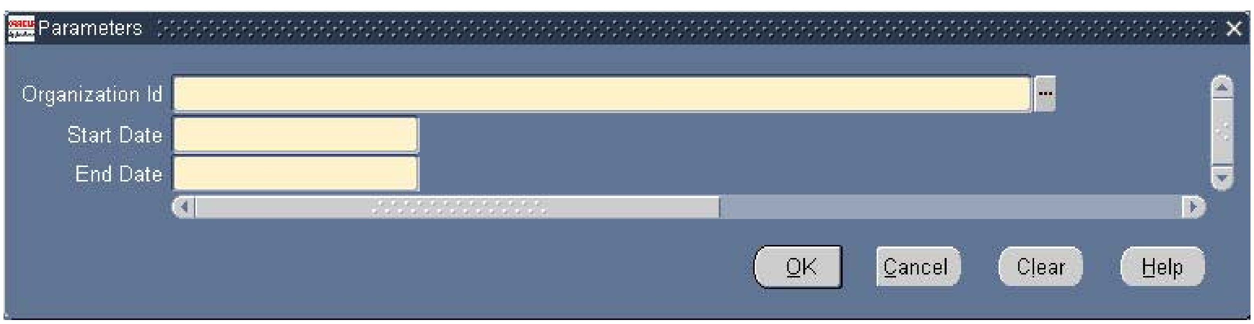


1. Select the **OK** button.

   Result: The **Submit Request** window is displayed.

2. Click on the **LOV** in the **Name** field and select **NIHTM New Traveler Addition Report**.

   Result: The **Parameters** window is displayed.



3. In the **Organization ID** field, select the organization from the **LOV** for which you would like the report to be run.

   Note: If you would like all new entries to be displayed, select **HN.**

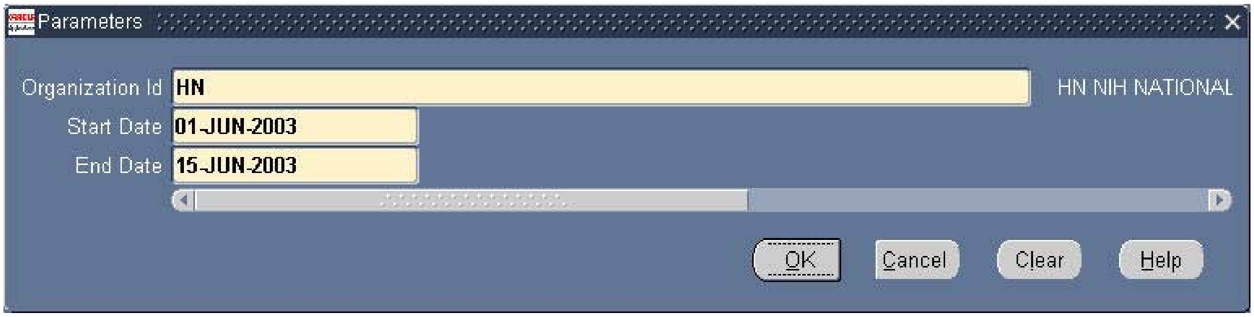
4. Tab to the **Start Date** field and enter the date from which you would like to review the entries.

Note: The date format DD-MMM-YYYY must be followed.

5. Tab to the **End Date** field and enter the date to which you would like to review the entries.

   Note: The date format DD-MMM-YYYY must be followed.

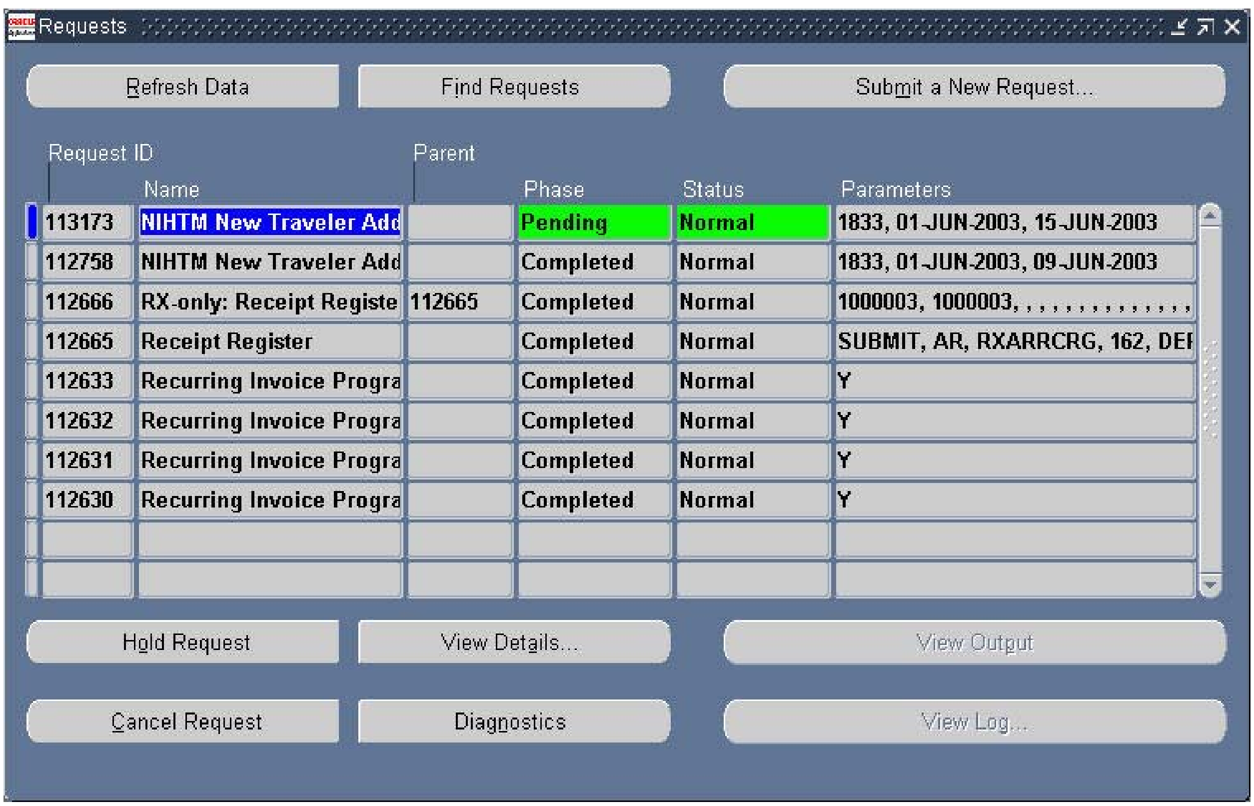
   Example: Below is an example completed parameters window.



6. Select the **OK** button.

7. Select the **Submit** button.

   Result: The **Requests** window is displayed.



8. Select the **Refresh Data** button until the **Phase** is completed.

9. Select the **View Output** button to view the report.

End of activity.

Adding Travelers to NBS Travel System

Non NIH-Affiliated Travelers

Guest Speakers, Interviewees, Advisory Committee Members, and all other travelers without ability to electronically sign documents

- Similar to the EIN Request process used with the ADB.
- Requests to have Non NIH-Affiliated Travelers added to the system are forwarded to a central point of contact at each IC. When the NBS deploys, this will be an Organization Administrator (Org Admin) at the IC.
- The Org Admin completes an online Oracle form and forwards it to OFM.
- OFM reviews the form.
- Email notification of approval or rejection is sent to the requestor.
- Upon approval, the traveler is added to the vendor database in Oracle and to the NBS Travel System database.
- The Org Admin then completes the traveler profile in the NBS Travel System.

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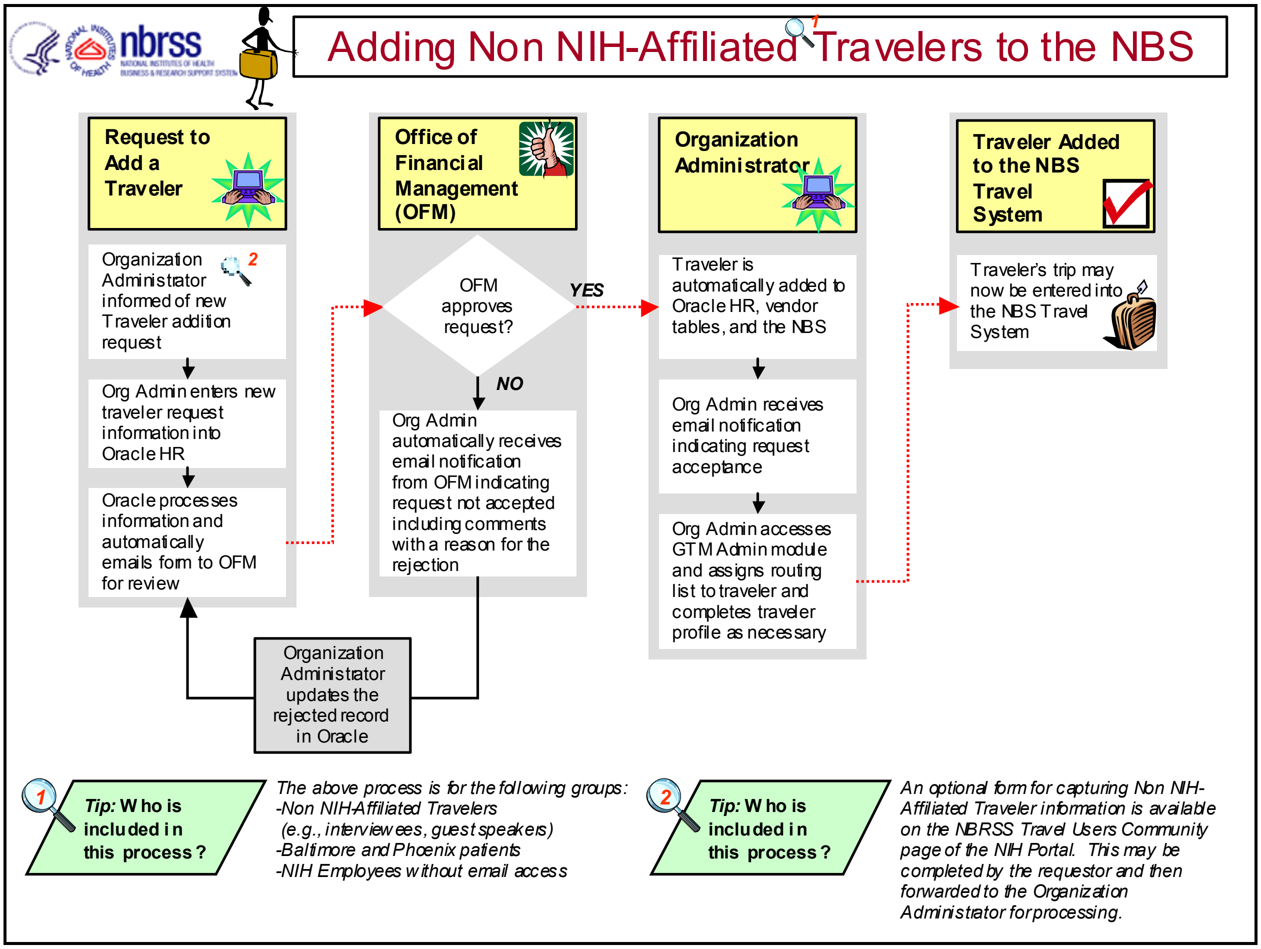
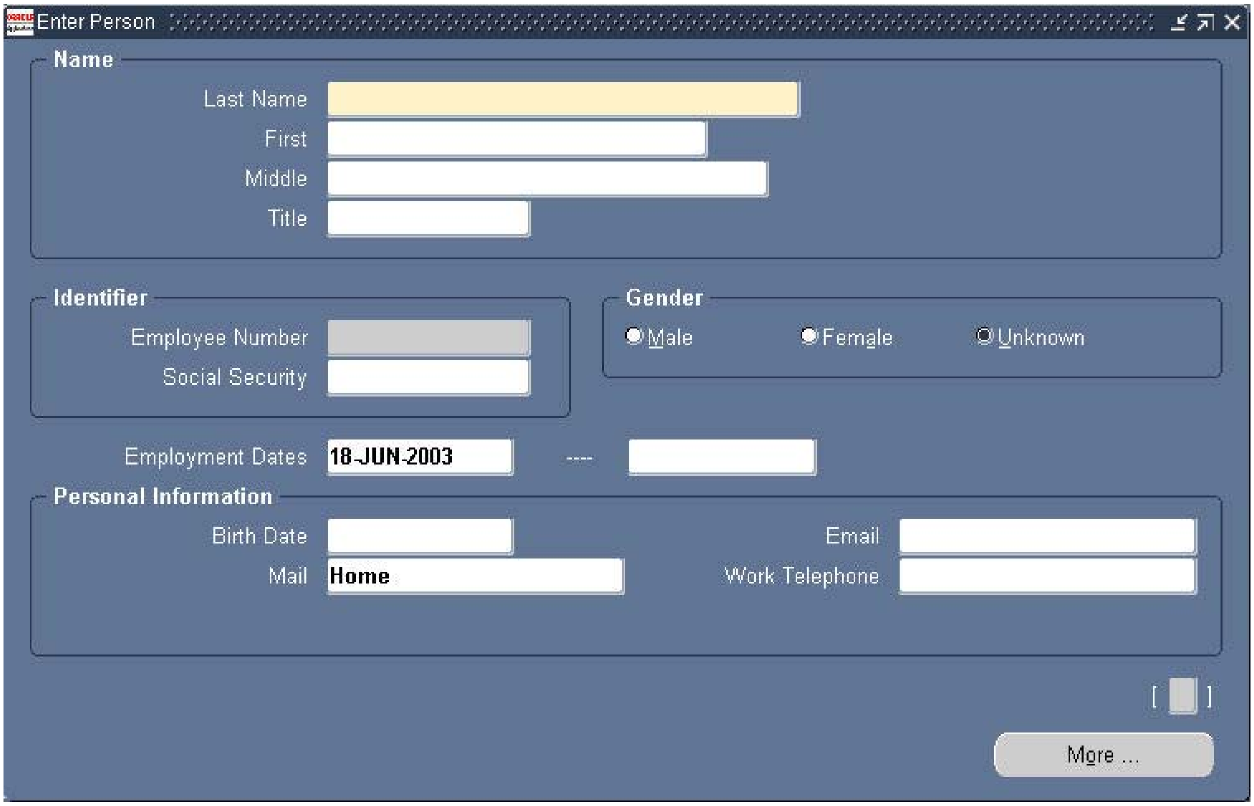
Organization Administrators will process requests for entering a new Non NIH-Affiliated traveler into the system and submit them to OFM. However, each IC will have to establish their process for generating and submitting these requests to the Organization Administrators.

Organization Administrators will complete an Oracle form as described in the next few pages. This form feeds the Oracle HR personal data screen but not the ACH portion. ICs must submit the ACH form (a paper document filled out by the traveler's bank) directly to the Government Accounting Office. When the ACH form arrives at this final destination, the OFM staff member will then access the traveler's data screen in Oracle, review the data that was entered by the Organization Administrator, and add the ACH on an appending screen. No Travel documents can be prepared without the ACH in place.


Adding Non NIH-Affiliated Travelers to the NBS
nbrss
Request to Add a Traveler
Organization Administrator informed of new Traveler addition request
Org Admin enters new traveler request information into Oracle HR
Oracle processes information and automatically emails form to OFM for review
Office of Financial Management (OFM)
OFM approves request?
YES
NO
Org Admin automatically receives email notification from OFM indicating request not accepted including comments with a reason for the rejection
Organization Administrator updates the rejected record in Oracle
Organization Administrator
Traveler is automatically added to Oracle HR, vendor tables, and the NBS
Org Admin receives email notification indicating request acceptance
Org Admin accesses GTM Admin module and assigns routing list to traveler and completes traveler profile as necessary
Traveler Added to the NBS Travel System
Traveler's trip may now be entered into the NBS Travel System
Tip: Who is included in this process?
The above process is for the following groups:
-Non NIH-Affiliated Travelers
(e.g., interviewees, guest speakers)
-Baltimore and Phoenix patients
-NIH Employees without email access
Tip: Who is included in this process?
An optional form for capturing Non NIH-Affiliated Traveler information is available on the NBRSS Travel Users Community page of the NIH Portal. This may be completed by the requestor and then forwarded to the Organization Administrator for processing.

Entering a New Non-NIH Affiliated Traveler Request

NIH Non Affiliates Entry User
N > Enter Person
Enter Person



1. Enter the traveler's last name in the **Last Name** field.

2. Tab to the **First** field and enter the traveler's first name.

   Result: The **Employee Number** field will be populated with a value beginning with "NN".

3. In the **Social Security** number field enter the individual's social security number.
   – Note: If no social security number is available, leave the field blank and enter a comment in the **flexfield** to the right of the **Details** box that states "Please assign a temporary 'filler' SSN." The **Details** box is documented below (Step 13).

4. In the **Gender** block, select the gender of the traveler.

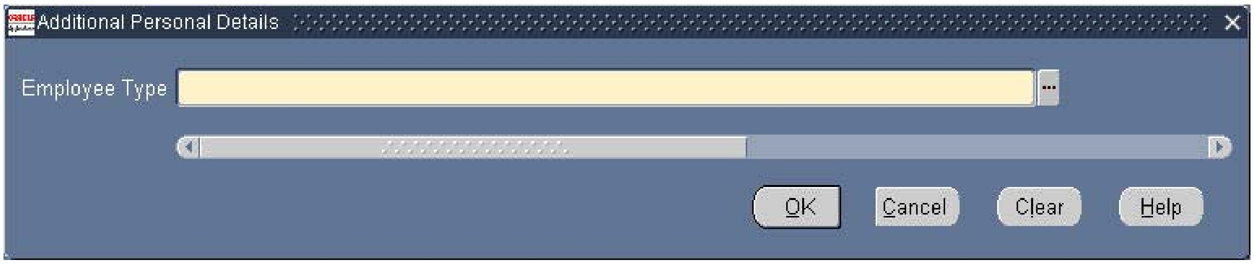
5. Enter the following in the **Personal Information** block:

   Note: These fields are optional.

Field	Description
Birth Date	Enter the traveler's birth date
Mail	Select **Home** or **Office** from the **LOV**
E-mail	Enter the traveler's email address
Work Telephone Number	Enter the traveler's work telephone number

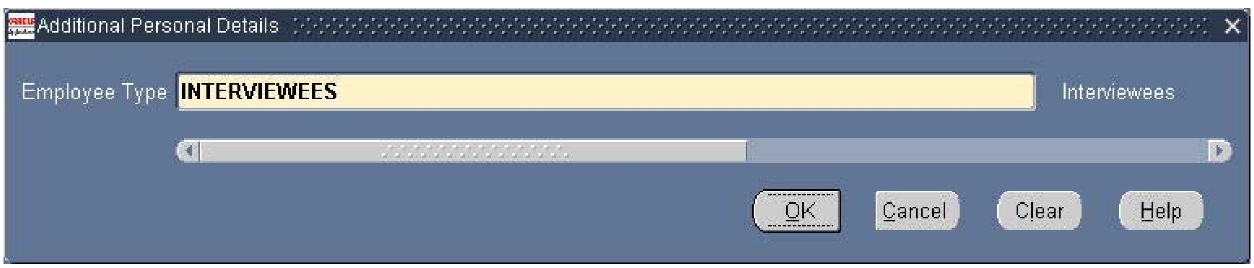
6. Place your cursor in the **Flexfield []**.

   Result: The **Additional Person Details** window is displayed.



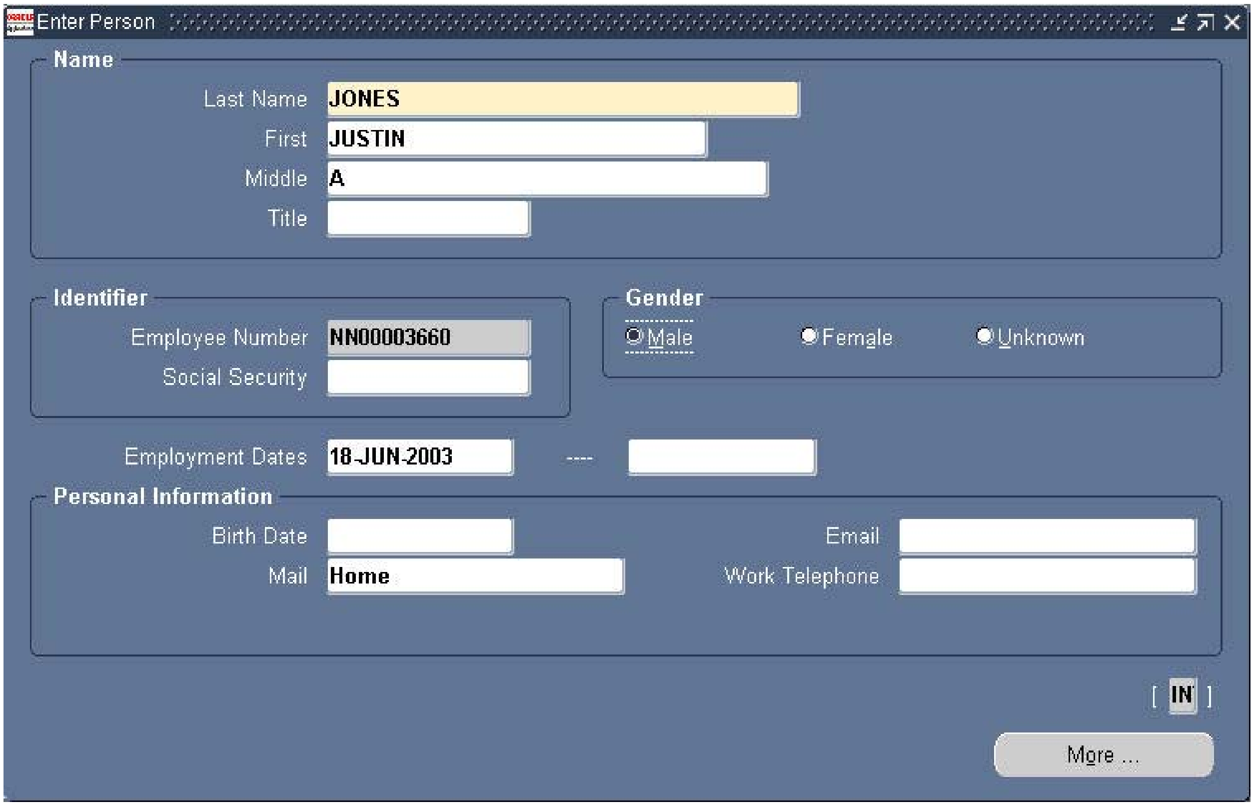
7. In the **Employee Type** field, use the **LOV** to select the appropriate type of traveler.

   Example: Below is a sample completed flexfield.



8. Select the **OK** button.

   Result: The **Additional Personal Details** window closes and you are returned to the **Enter Person** window.

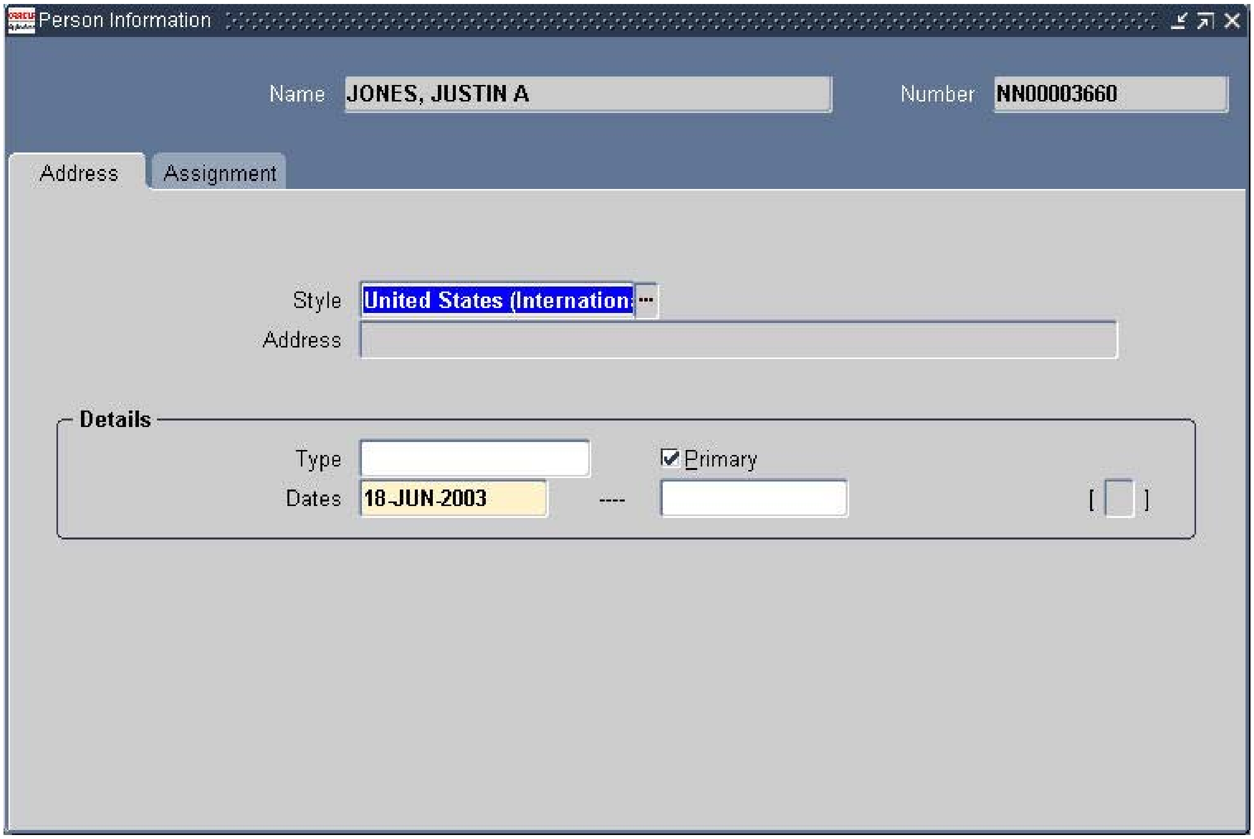


9. Save your changes.

   Note: You must save the record before proceeding to the next step or the system will stop you.

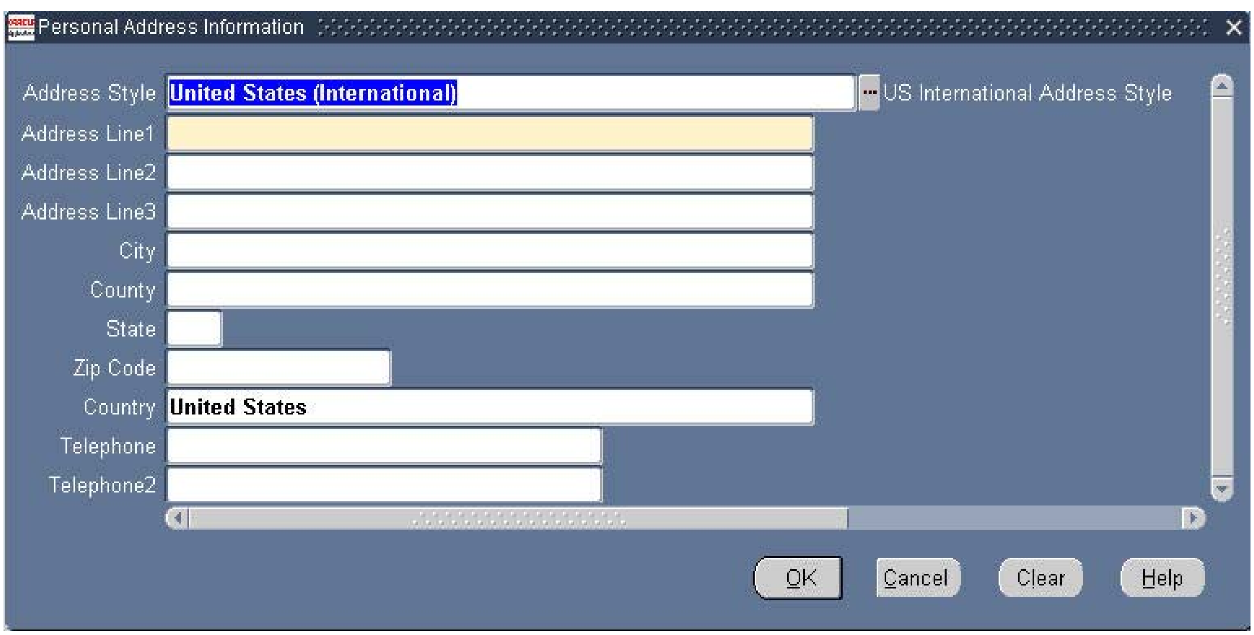
10. Select the **More** button.

    Result: The **Person Information** window is displayed.



11. Place your cursor in the **Address** field.

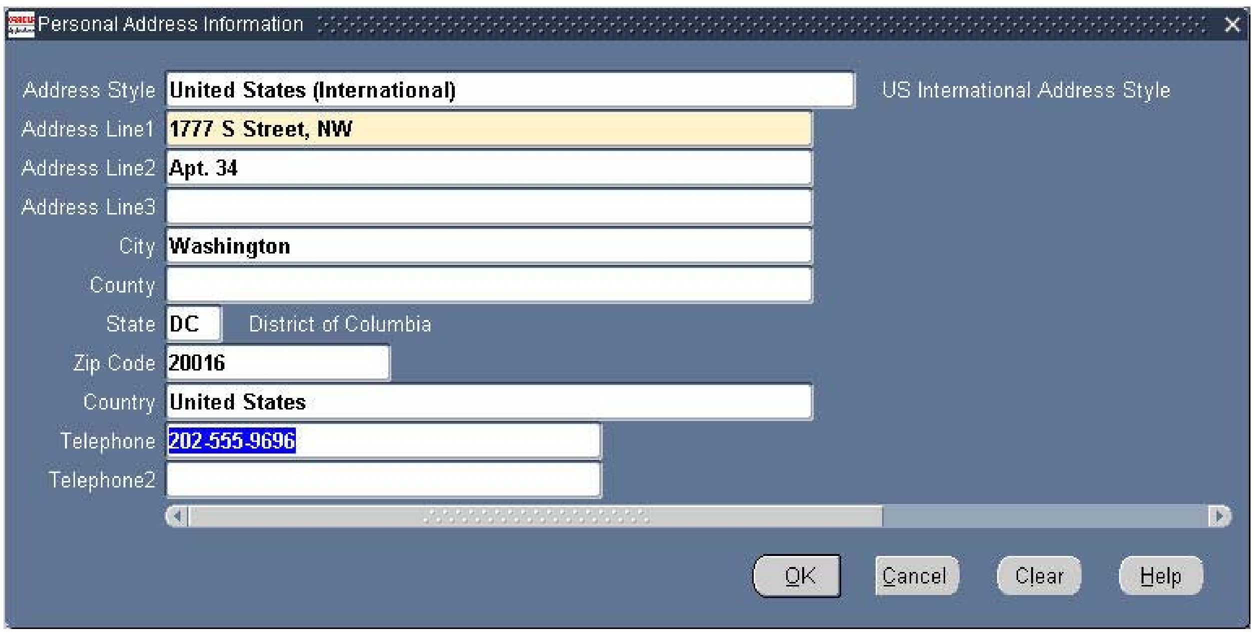
<u>Result</u>: The **Personal Address Information** window is displayed.



12. Enter the traveler's address and telephone information as described below.

Field Name	Description
Address Style	Defaults to **United States (International)**. Do not change.
Address Line1	Enter the street address of the person.
Address Line2	Enter additional street address information.
Address Line3	Enter additional street address information.
City	Enter the city information
County	Enter the county information
State	Select the state information from the **LOV**.
Zip Code	Enter the zip code
Country	Select a country from the **LOV**.
Telephone	Enter a telephone number for the person.
Telephone2	Enter an alternative telephone number for the person.

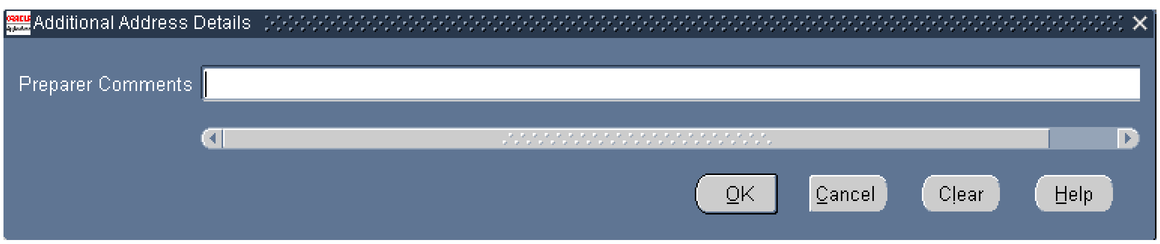
Example: Below is a sample completed **Personal Address Information** form.



13. Select the **OK** button.

Result: You are returned to the **Person Information** window.

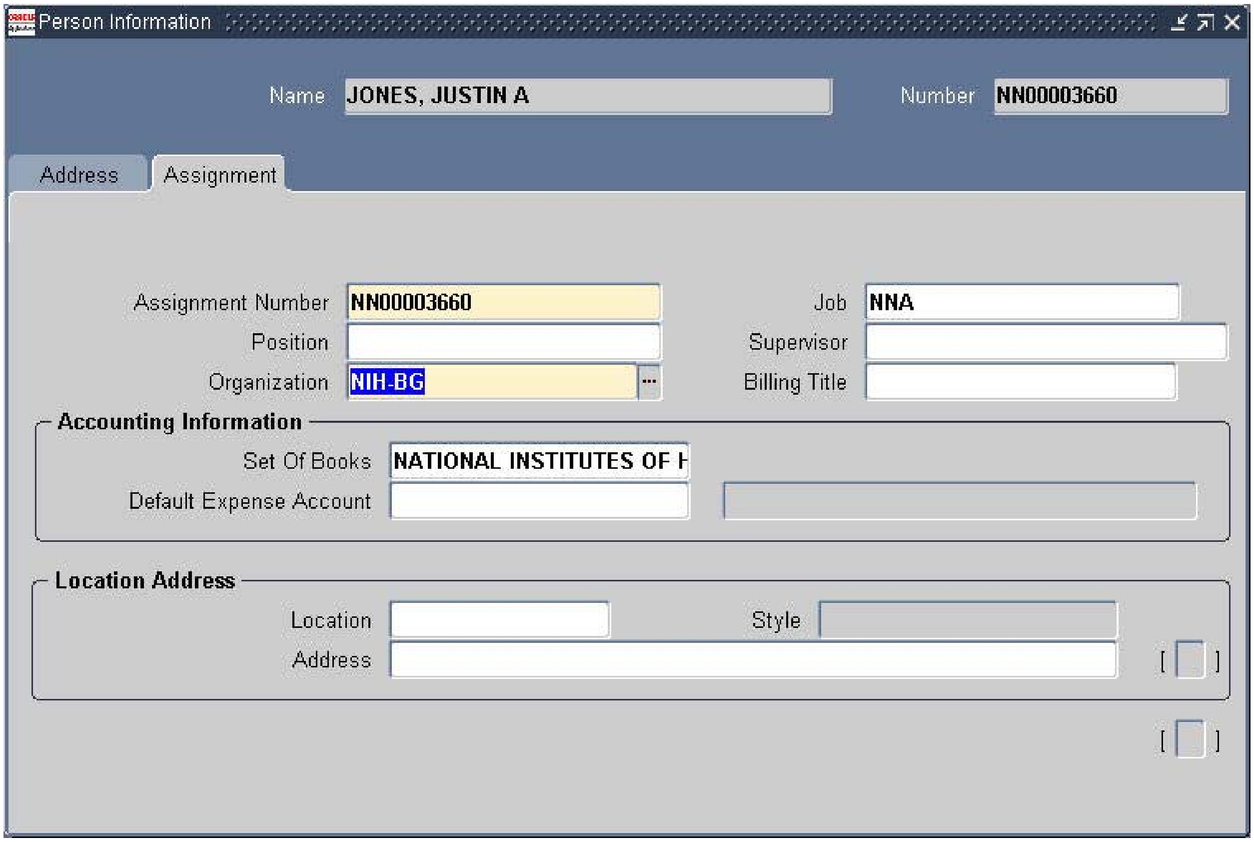
Note: To enter any additional information about this traveler, use the **flexfield** located on the right side of the **Details** box.



Result: The **Additional Address Details** window is displayed. Enter the comments in the **Preparer's Comments** field. When finished, select the **OK** button.

Result: The **Additional Address Details** window closes and you are returned to the **Person Information** window.

14. Select the **Assignment** tab.

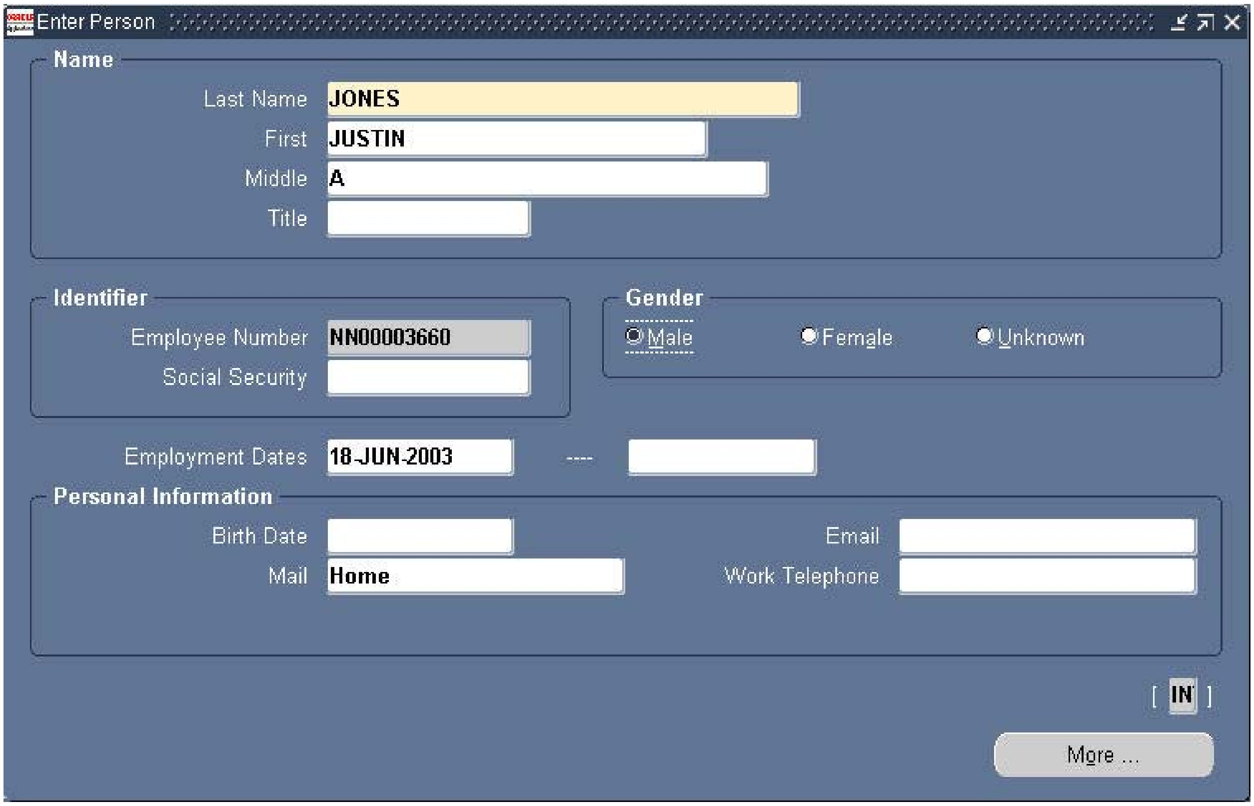


15. Tab to the **Organization** field and use the **LOV** to locate the correct organization.

16. Save your work.

17. Close the **Person Information** window.

    Result: The **Enter Person** window is displayed.

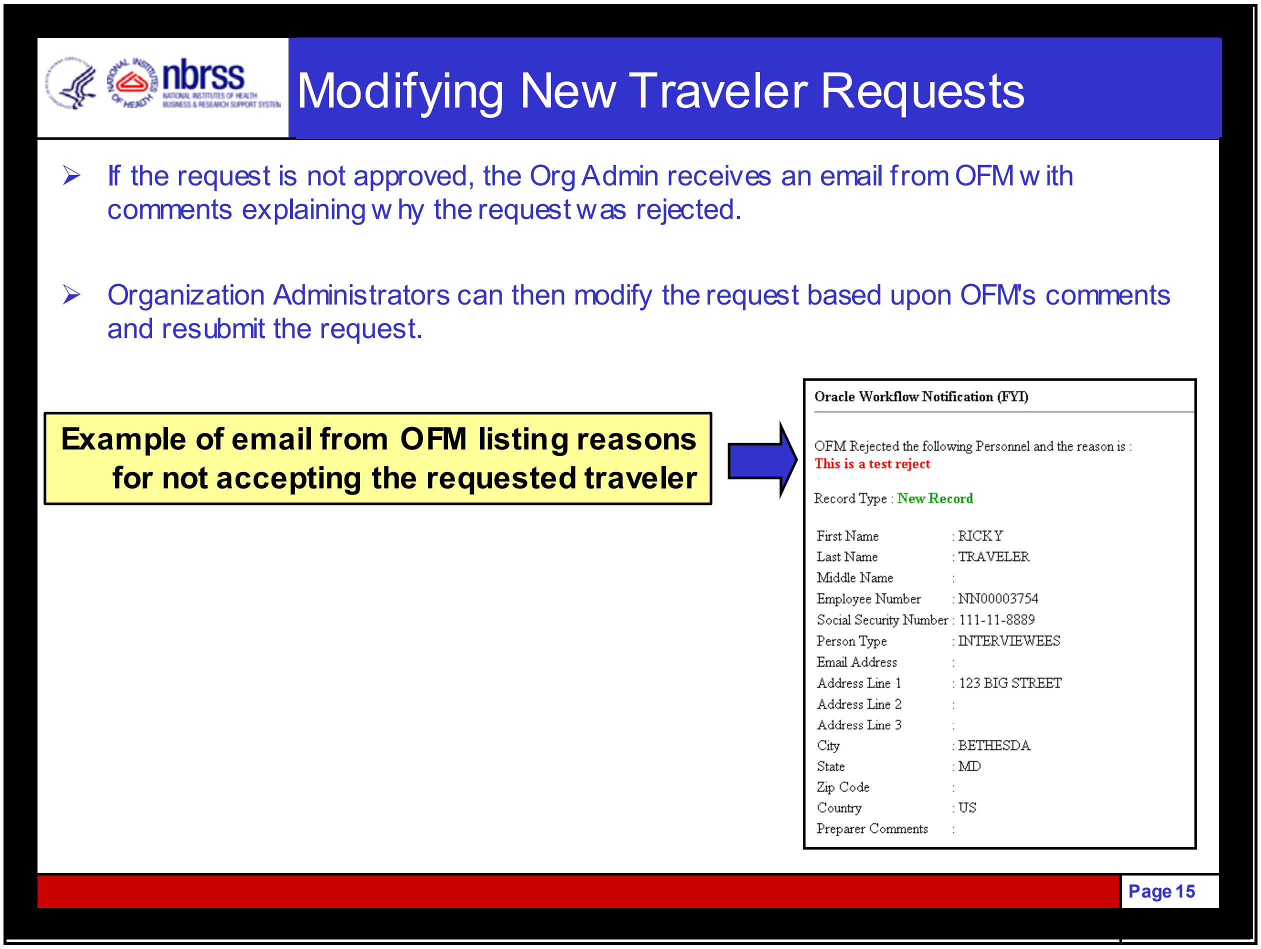


What if you get a Rejected Request?

Read and understand the reason for the rejections. Then modify the existing record in Oracle with the requested information and resubmit as an updated record. Do NOT create a new record for the person. For assistance with modifying an existing record refer to the Student Guide chapter on “Modifying New Traveler Requests.”

End of activity.

Modifying New Traveler Requests

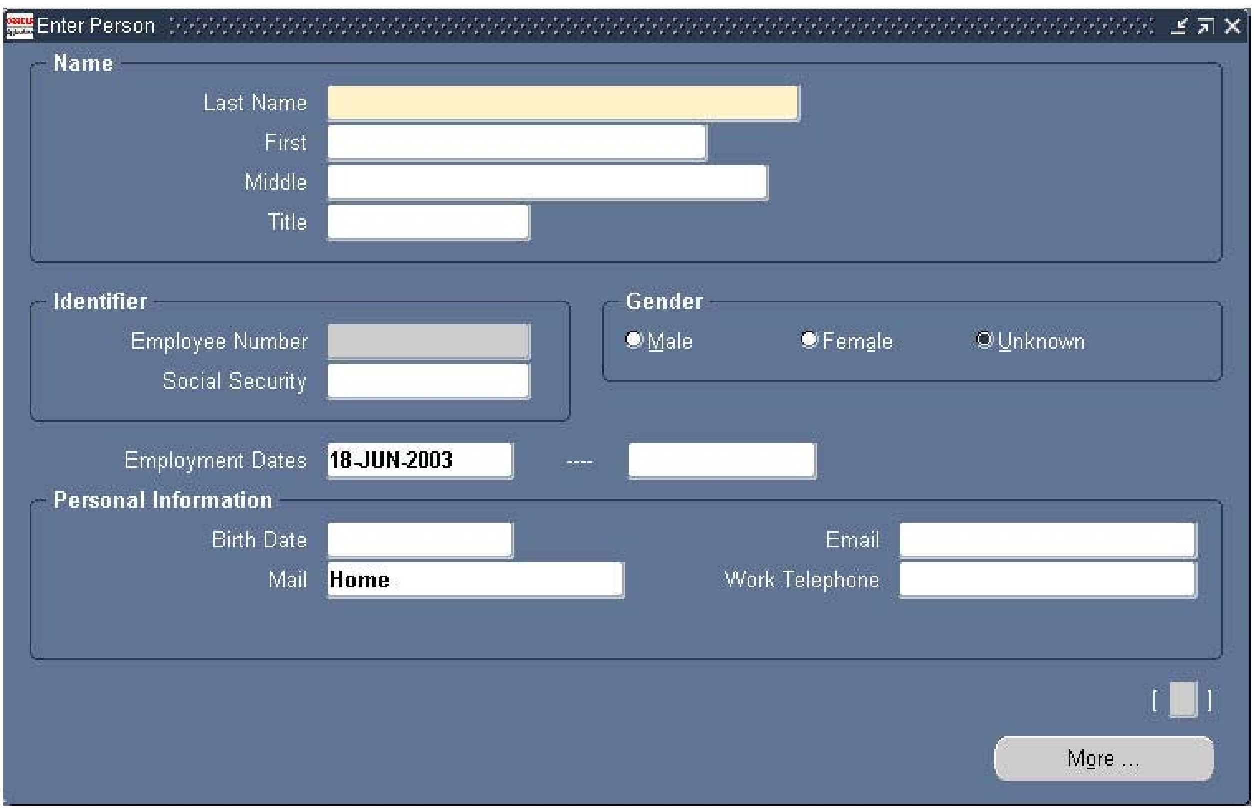


Modifying New Traveler Requests

NIH Baltimore Patient Entry User
N > Enter Person
Enter Person

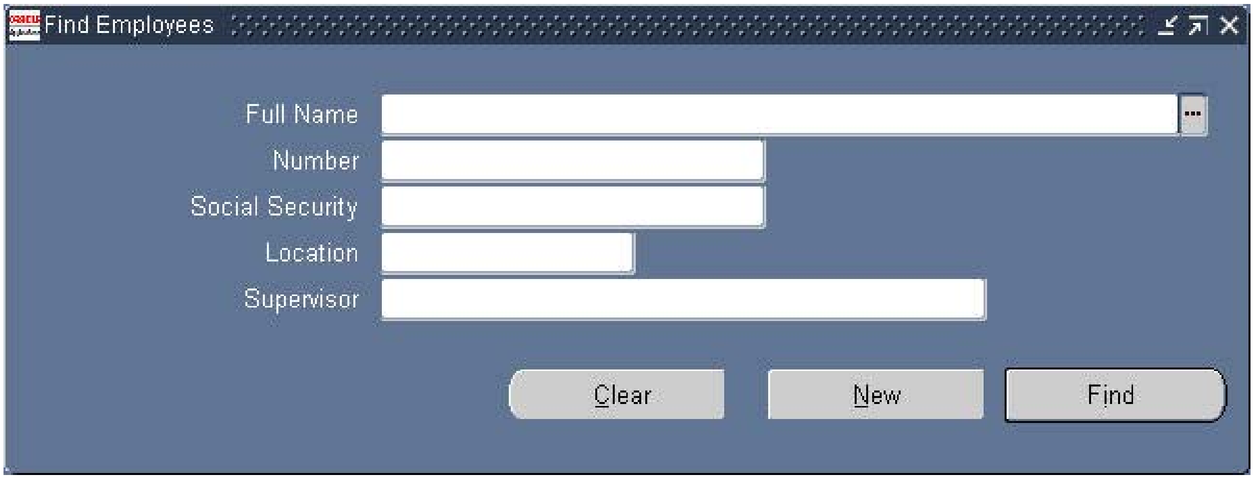
NIH Phoenix Patient Entry User
N > Enter Person
Enter Person

NIH Non Affiliates Entry User
N > Enter Person
Enter Person



1. Select the **Find**  button from the applications toolbar.

   Result: The **Find Employees** window is displayed.

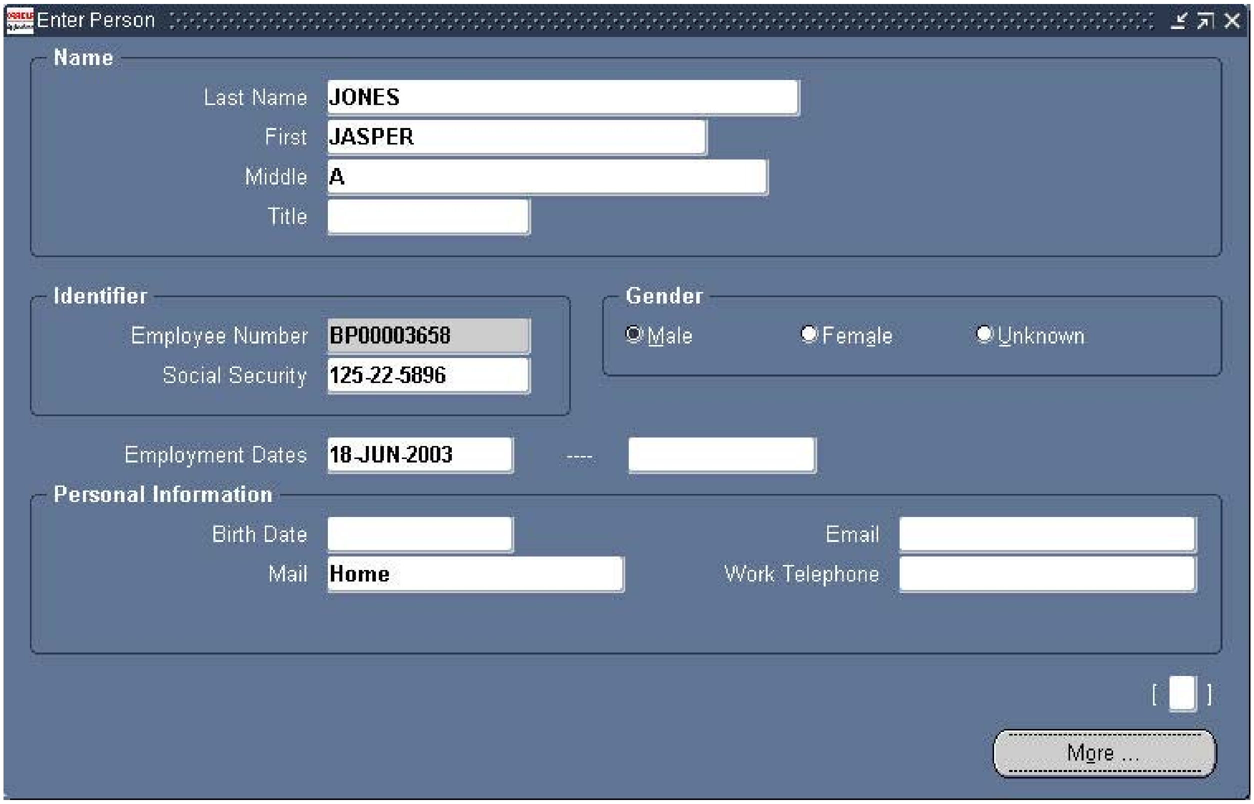


2. Enter the search criteria as described below:

Field	Description
Full Name	Select the person's full name from the **LOV**
Number	Enter the employee number or select it from the **LOV**.
Social Security	Enter the person's social security number or select it from the **LOV**.
Location	Enter the person's location or select it from the **LOV**.
Supervisor	The NIH currently does not use this field.

3. Select the **Find** button.

   Result: The record is displayed.

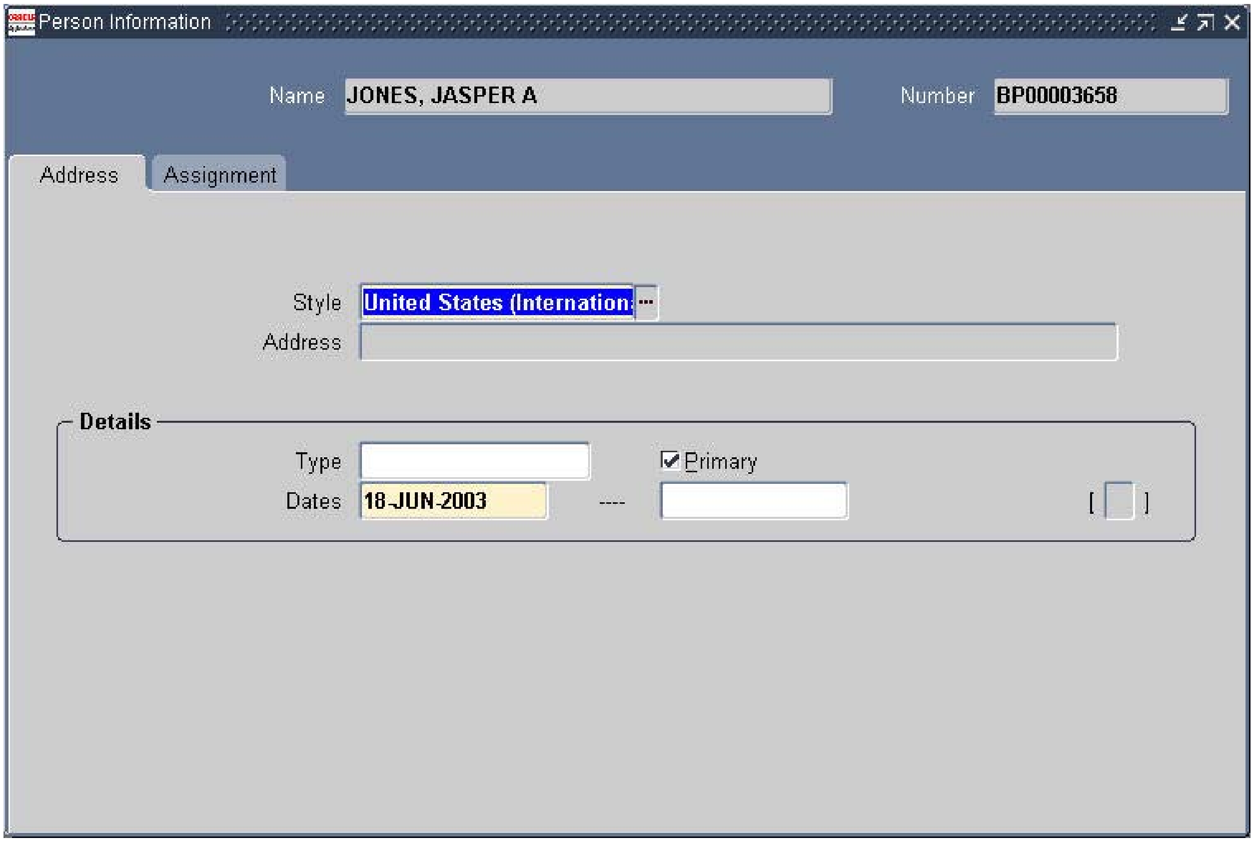


4. Modify the information on the **Enter Person** window as necessary.

5. Save your work.

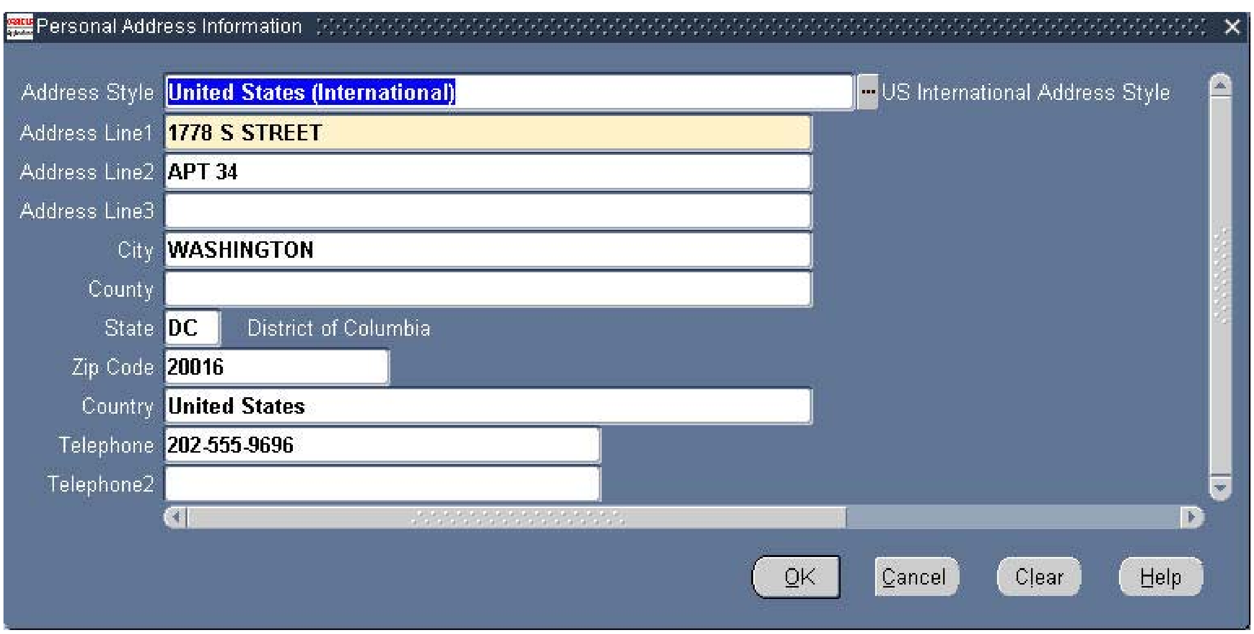
6. Select the **More** button.

   Result: The **Person Information** window is displayed.



7. Place your cursor in the **Address** field.

   Result: The **Personal Address Information** window is displayed.



8. Modify the traveler's address and telephone information as described below.

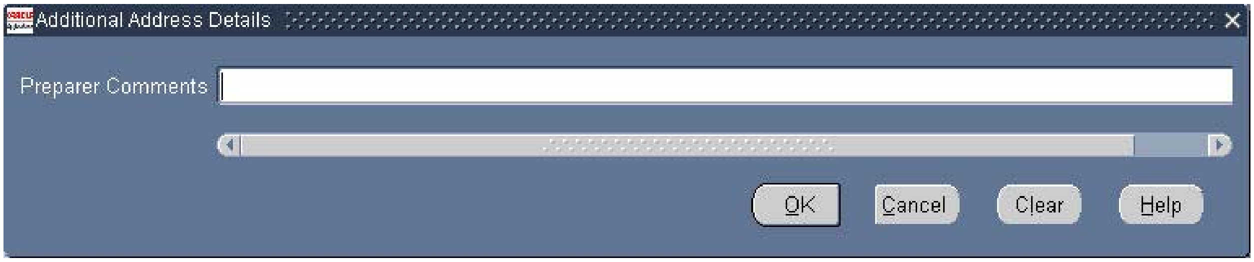
Field	Description
Address Style	Defaults to **United States (International)**
Address Line1	Enter the street address of the person
Address Line2	Enter additional street address information
Address Line3	Enter additional street address information
City	Enter the city information
County	Enter the county information
State	Select the state information from the **LOV**
Zip Code	Enter the zip code
Country	Select a country from the **LOV**
Telephone	Enter a telephone number for the person
Telephone2	Enter an alternative telephone number for the person

9. Select the **OK** button.

   Result: You are returned to the **Person Information** window.

10. Place your cursor in the **Flexfield []** located within the **Details** block.

    Result: The **Additional Address Details** window is displayed.



11. In the **Preparer Comments** field, enter additional comments on this record.

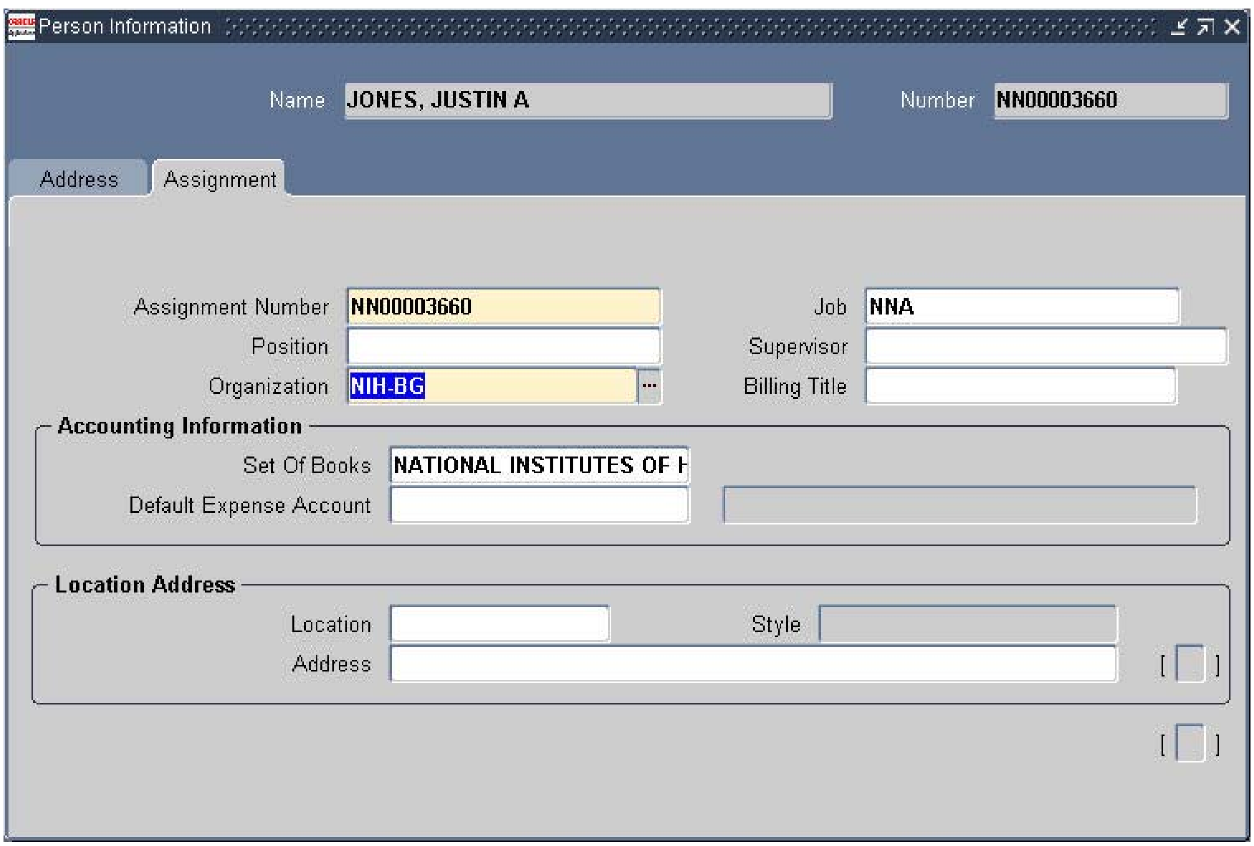
    Notes:
    – Describe the changes made to the traveler record.
    – The comments will be displayed in the email notification to OFM.
    – If the person does not have a SSN, then request a pseudo SSN number in this field.

12. Select the **OK** button.

    Result: The **Additional Address Details** window closes and you are returned to the **Person Information** window.

If changes to the organization are required, goto task #13. Otherwise, goto task #15.

13. Select the **Assignment** tab.

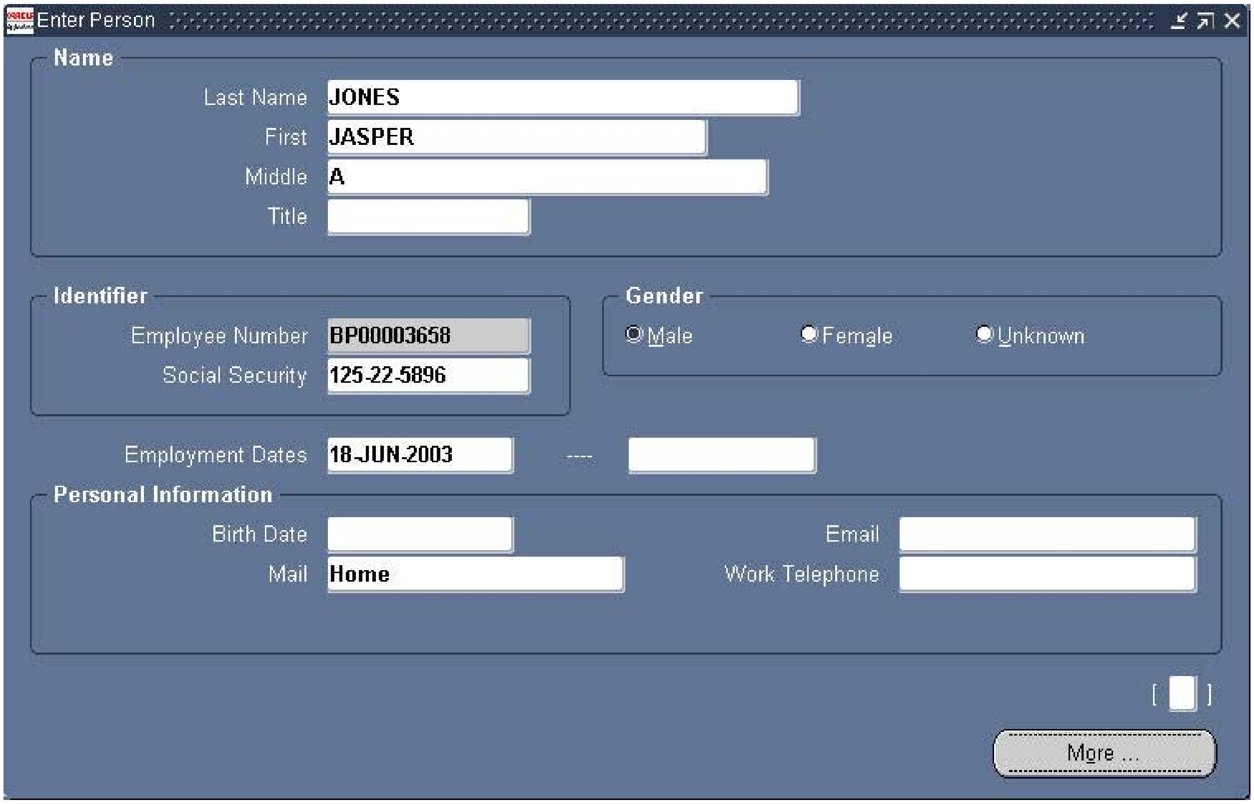


14. Tab to the **Organization** field and use the **LOV** to locate the correct organization.

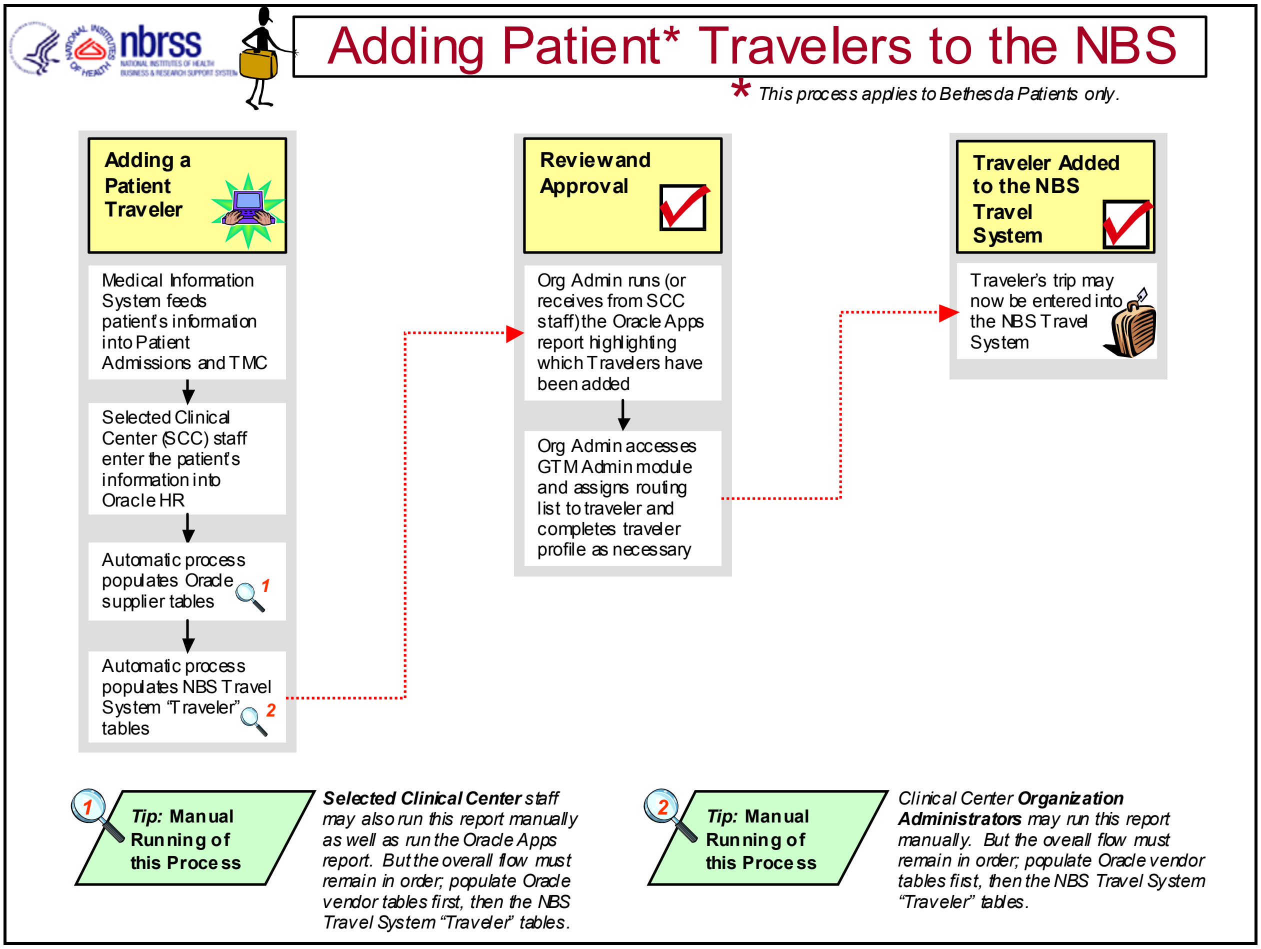
15. Save your work.

16. Close the **Person Information** window.

    Result: The **Enter Person** window is displayed.



End of activity.



Adding Patient* Travelers to the NBS
* This process applies to Bethesda Patients only.
Adding a Patient Traveler
Medical Information System feeds patient's information into Patient Admissions and TMC
Selected Clinical Center (SCC) staff enter the patient's information into Oracle HR
Automatic process populates Oracle supplier tables 1
Automatic process populates NBS Travel System "Traveler" tables 2
Review and Approval
Org Admin runs (or receives from SCC staff) the Oracle Apps report highlighting which Travelers have been added
Org Admin accesses GTM Admin module and assigns routing list to traveler and completes traveler profile as necessary
Traveler Added to the NBS Travel System
Traveler's trip may now be entered into the NBS Travel System
1 Tip: Manual Running of this Process
Selected Clinical Center staff may also run this report manually as well as run the Oracle Apps report. But the overall flow must remain in order; populate Oracle vendor tables first, then the NBS Travel System "Traveler" tables.
2 Tip: Manual Running of this Process
Clinical Center Organization Administrators may run this report manually. But the overall flow must remain in order; populate Oracle vendor tables first, then the NBS Travel System "Traveler" tables.

Other Topics Regarding Travelers

Other Topics Regarding Travelers

- Need to update/change a Non NIH-Affiliated Traveler record?
  - Access the Enter Person form in Oracle
  - Search for the Traveler
  - Update the record and save it

- Is a Non NIH-Affiliate now an NIH-Affiliated Traveler
  - Add the traveler to NED
  - Add the traveler's NIH-Affiliated record to your Group Members and assign his/her new record to a Routing List
  - Remove the Non NIH-Affiliated record from your Group Members

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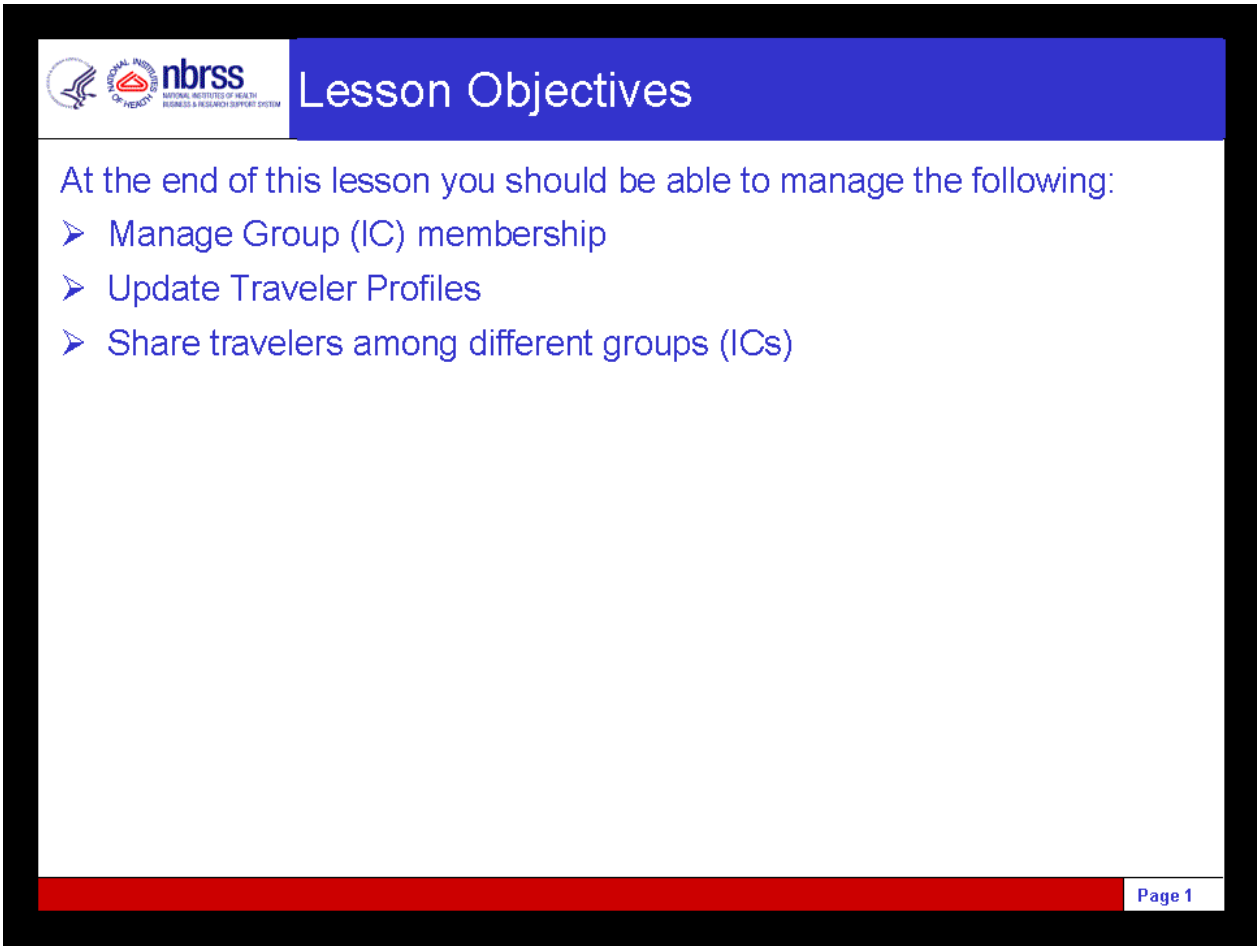
Manage Travelers

Chapter 5


nbrss
NATIONAL INSTITUTES OF HEALTH
BUSINESS & RESEARCH SUPPORT SYSTEM
Manage Travelers
February, 2004

Lesson Objectives



Group (IC) Members

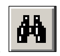
Group (IC) Members

- Navigation path: Doc Prep Admin> Setup> Security> Groups> Group Members
- ICs are referred to as groups
- Group members are the travelers at your IC
- Org Admins may not create or delete groups, only group *members*
- Adding group members makes the traveler visible in the traveler listing screen in the NBS Travel System when the Travel Planner creates a new document
- Deleting group members removes the traveler name from the traveler listing screen in the NBS Travel System when the Travel Planner creates a new document
  - Examples of times to delete a group member:
    - Traveler leaves your IC and you will no longer be preparing any travel documents for him/her
    - Traveler was in the NBS Travel System as a Non NIH-Affiliated traveler, but is now an NIH-Affiliated traveler (not deleting the Non NIH-Affiliated traveler listing would cause the traveler to be listed twice with two different EINs)

Page 1

Group (IC) Member - Adding

Organization Administrator
N> Navigation Tree> Doc Prep Admin>Setup> Security> Groups>Group Members
Group Members

1. In the Filter area, select the **Lookup** icon  next to the **Organization** field.

   <u>Result:</u> A separate **Organization Lookup** window will appear.

2. Select the row with the desired Organization.

   <u>Result:</u> That row will turn blue.

3. Select the **OK** button.

   <u>Result:</u> The **Organization** field in the Filter Area is populated with the selected organization.

4. Enter the desired group name in the **Group Name** field in the **Filter** Area.

5. Select the **Apply Filter** button.

   <u>Result:</u> The Organization/Group Name table will display all Group Names associated with the selected Organization.

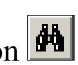
6. Select the row with the desired **Organization/Group Name**.

   <u>Result:</u> The selected row will turn blue. The current group members will appear in the Traveler Name column below.

7. Select the **Add Record** icon.  The cursor will automatically populate in the **Name** field.

   <u>Note:</u> **You must select Add Record.** If you do not select Add Record and you have a Group Member selected in the table above, the member will be replaced, rather than adding someone.

   <u>Note:</u> Alternatively, you may select File>Add Record from the Menu Toolbar.

8. To the right of the **Name** field, select the **Lookup** icon  to search through a list for the traveler's name that you want to add to this group.

   <u>Result:</u> A Traveler Lookup window will appear.

Note: **You must use the Lookup icon**. This will allow you to search on the combination of the traveler name and EIN. Not doing so, may select a different traveler with the same name, but different EIN.

9. In the Traveler Lookup window, enter the desired last name of the Traveler you wish to add to the group. When the desired Traveler's name appears, select the appropriate row with that name; the row will turn blue. Select the OK button.

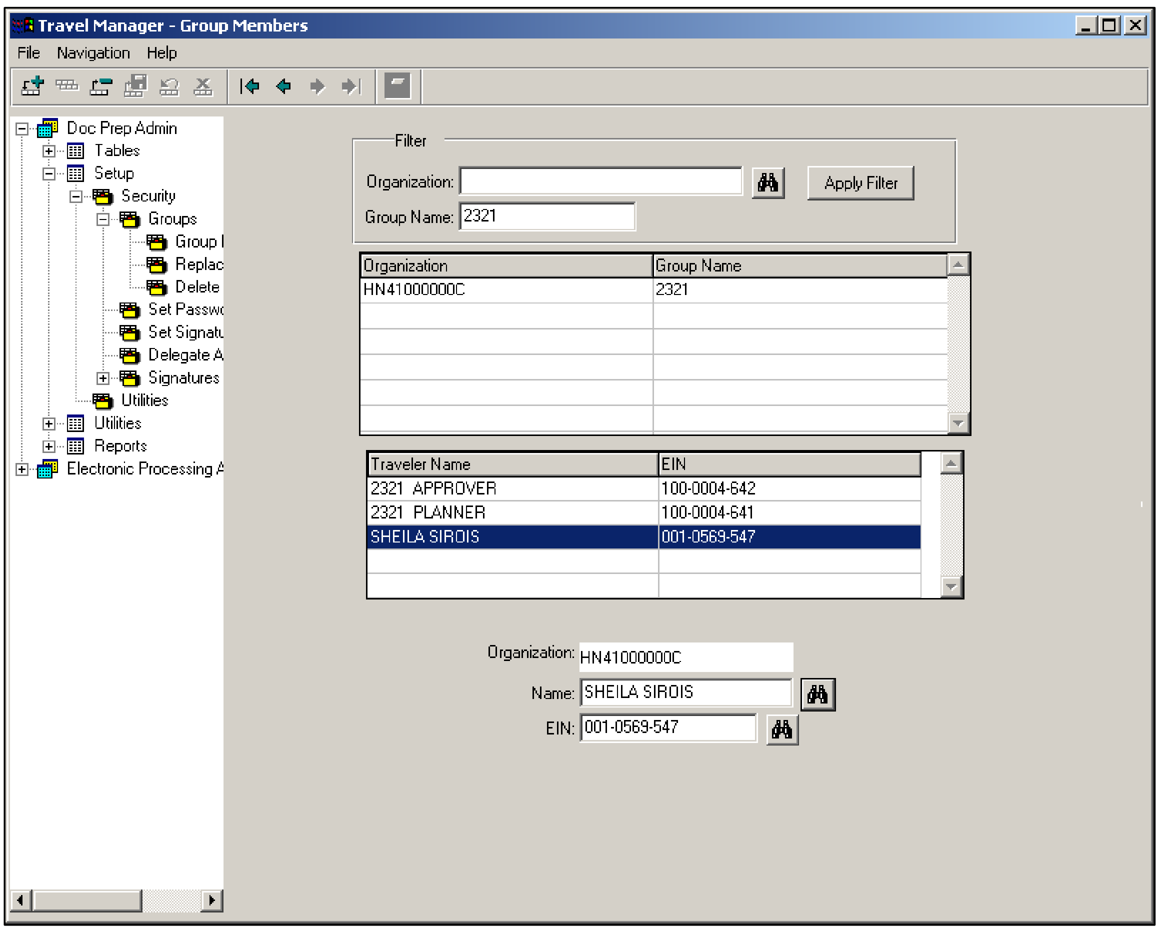
   Result: The person's Name and EIN information populate the respective fields.

   Note: Alternatively, you may use the Lookup Icon to the right of the EIN field to search for the person by EIN (Employee Identification Number). The person's Name and EIN information populate the respective fields.

10. Select the **Save Record** icon. 

   Note: Alternatively, you may select File>Save Record from the Menu Toolbar.

   Result: Your screens should look similar to the ones below.



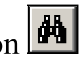
End of activity.

Group (IC) Member - Deleting

Organization Administrator

N> Navigation Tree> Doc Prep Admin>Setup> Security>Groups> Group Members

Group Members

1. From the **Filter** area, select the **Lookup** icon  to the right of the **Organization** field.

   Result: An Organization Lookup window will appear.

2. Select the row that shows the Organization name.

   Result: That row will turn blue.

3. Select the **OK** button.

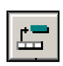
4. Enter your **group name** in the Group Name field.

5. Select the **Apply Filter** button.

6. From the Organization/Group Name Table, select the desired organization and group name combination.

   Result: The current group members will appear in the Traveler Name/EIN Table below.

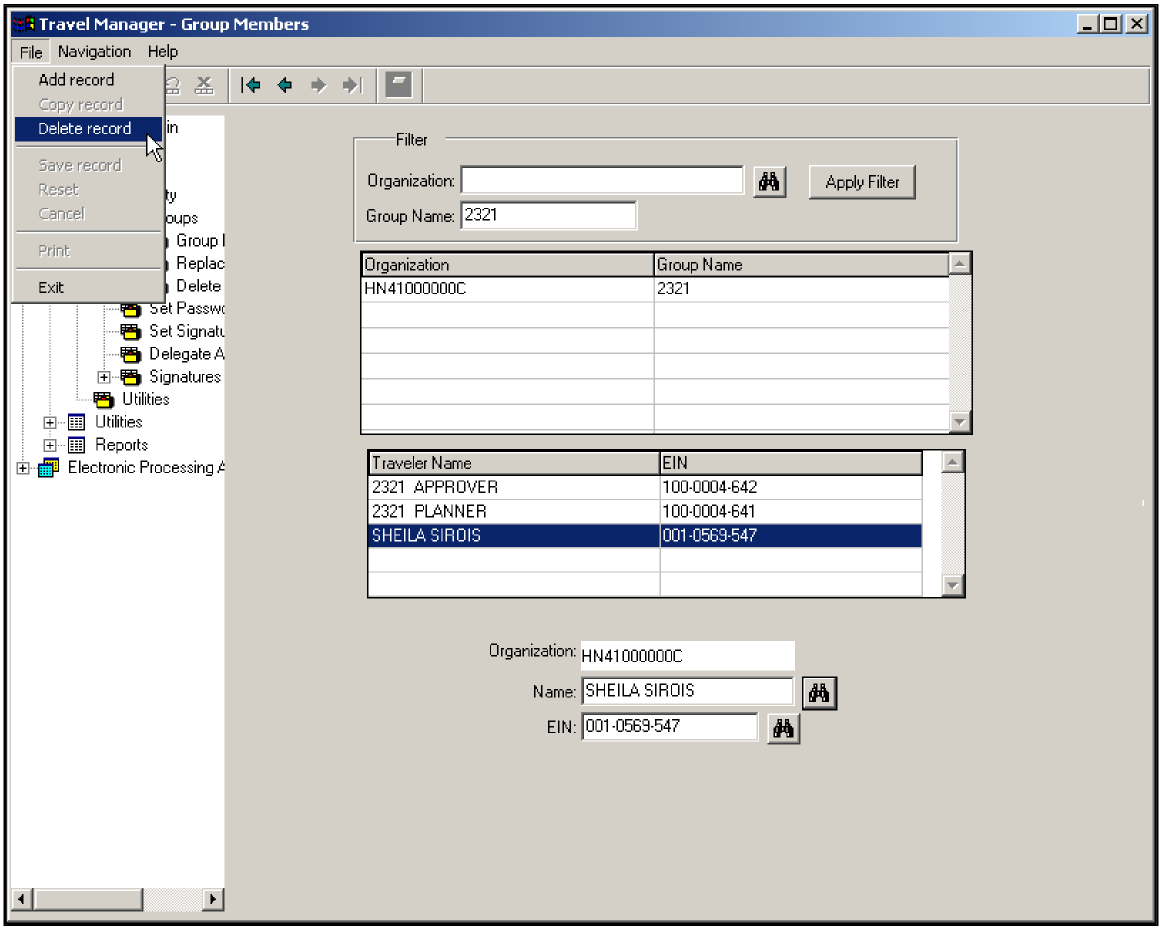
7. From the Traveler Name/EIN Table, select the row with the name you wish to delete.

8. Select the **Delete Record** icon. 

   Note: Alternatively, you may select File>Delete Record from the Menu Toolbar.

   Examples of reasons to delete a traveler from your group members listing:
   - Traveler leaves your IC and you will no longer be preparing any travel documents for him/her
   - Traveler was in the NBS Travel System as a Non NIH-Affiliated traveler, but is now an NIH-Affiliated traveler (not deleting the Non NIH-Affiliated traveler listing would cause the traveler to be listed twice with two different EINs)

9. A modal (message) will appear, asking, "Do you really want to delete the record?" Select the appropriate answer.



End of activity.

Traveler Profiles

Traveler Profiles

- Navigation path: Doc Prep Admin> Tables> Setup Tables> Traveler Information
- Complete the traveler profile for each traveler at your IC
- Fields to focus on:
  - Charge Card - identifies if they are a frequent traveler or eligible for a cash advance
  - Routing List - determines which electronic path the traveler's travel documents will follow for review and approval
  - Email - identifies where email notification will be sent; this should match the traveler's NIH Global email address
- Travelers may be members of multiple groups but only be assigned to one routing list

Page 1

Traveler's Profile - Updating

Organization Administrator
N> Navigation Tree, select Doc Prep Admin>Tables> Setup Tables> Traveler Information.
Traveler Information

1. From the Filter area, enter the last name of the person whose information needs to be updated, and select the **Apply Filter** button. The Name/EIN table will populate with the search results.

   Note: Alternatively, you may use the Filter area to search by EIN for the Traveler.

2. From the Name/EIN table, review the search results and select the row containing the desired Traveler name in the Traveler column.

   Result: That row will turn blue. The Traveler's information will populate the fields at the bottom half of the screen.

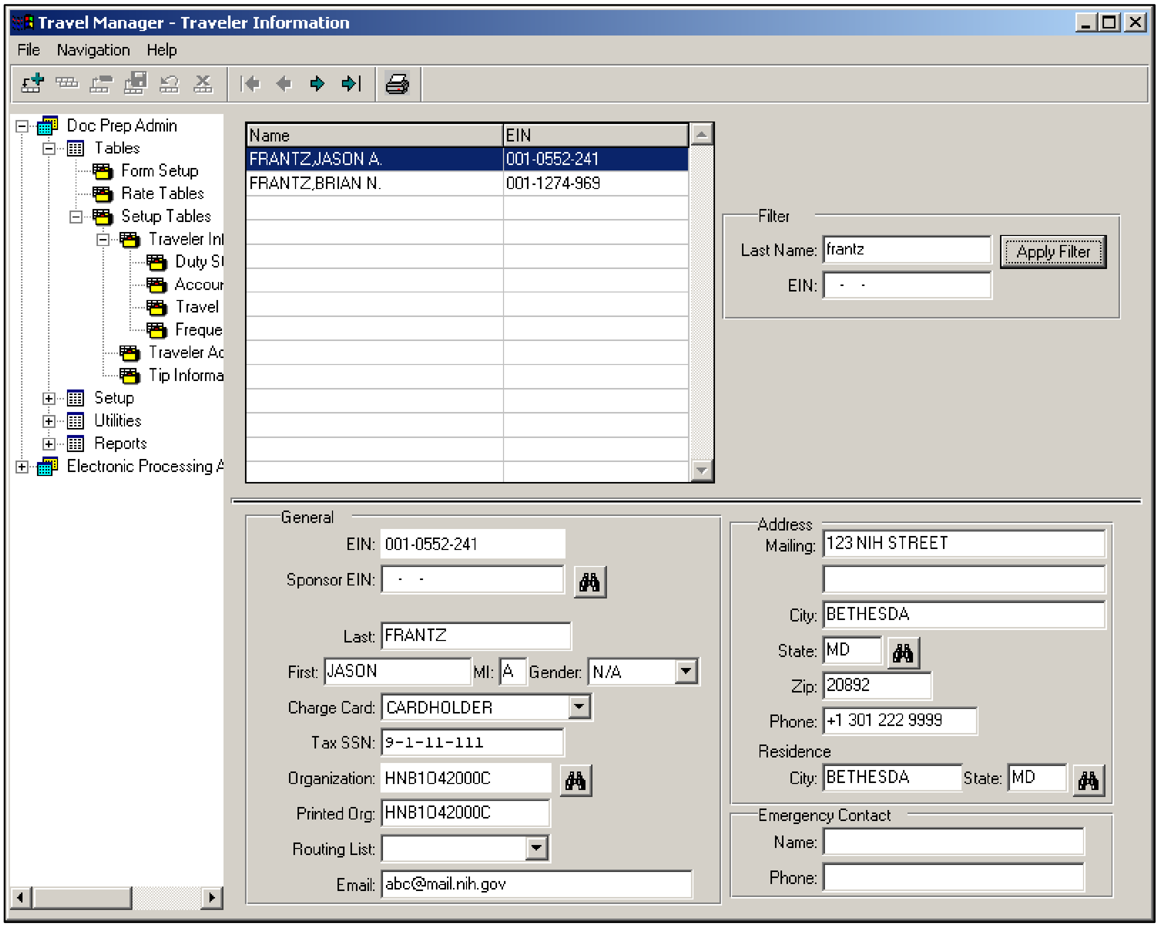
3. Update or complete the information as necessary.

   Note: At a minimum, the Traveler must be assigned an EIN, Charge Card Status and Routing List. The email address listed is where notification to sign documents will be sent.

4. Select the Save Record icon .

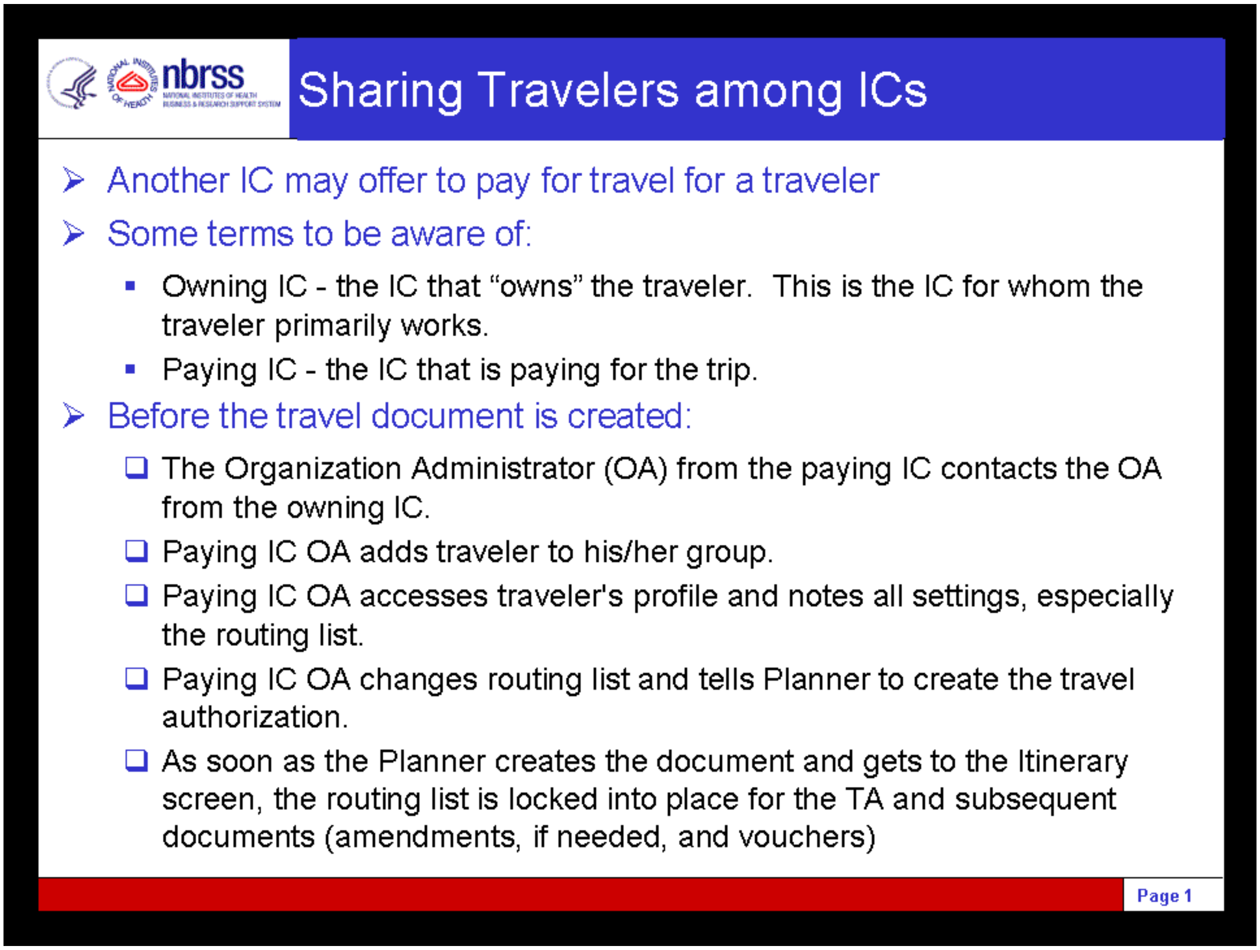
   Note: Alternatively, you may select File>Save from the Menu Toolbar.

Result: Your screen should look similar to this.

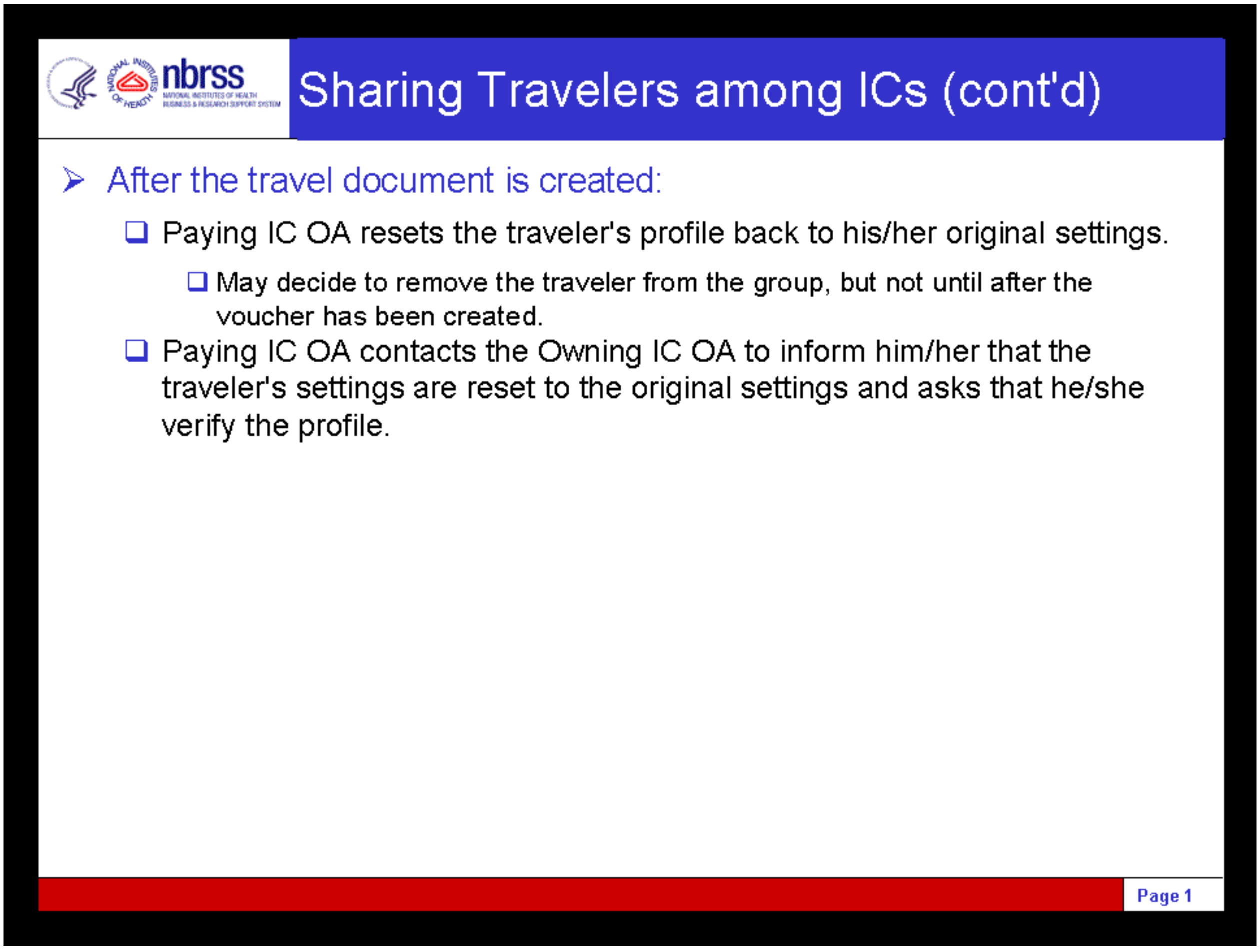


End of activity.

Sharing Travelers among ICs

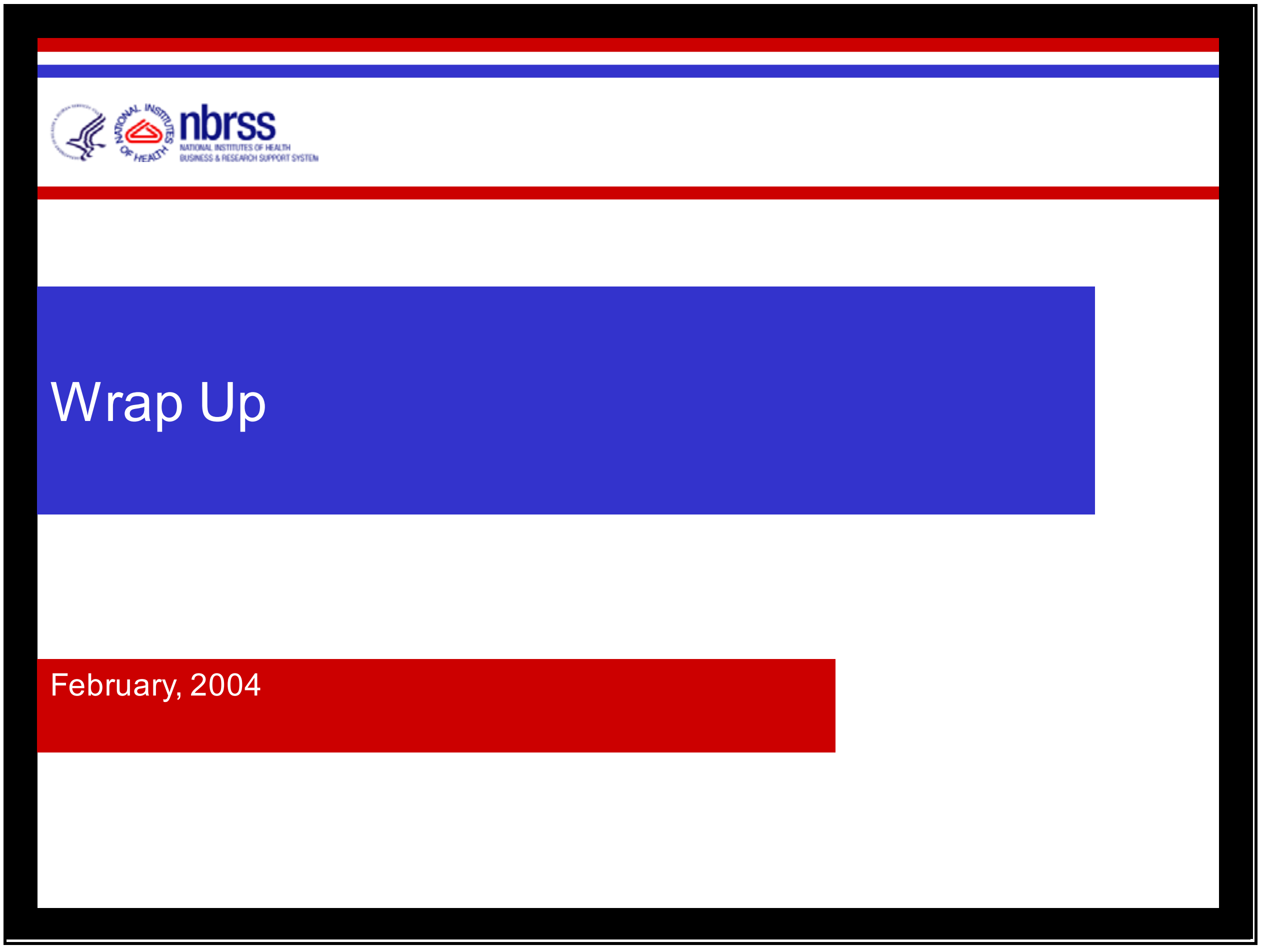


Sharing Travelers among ICs (cont'd)



Wrap Up

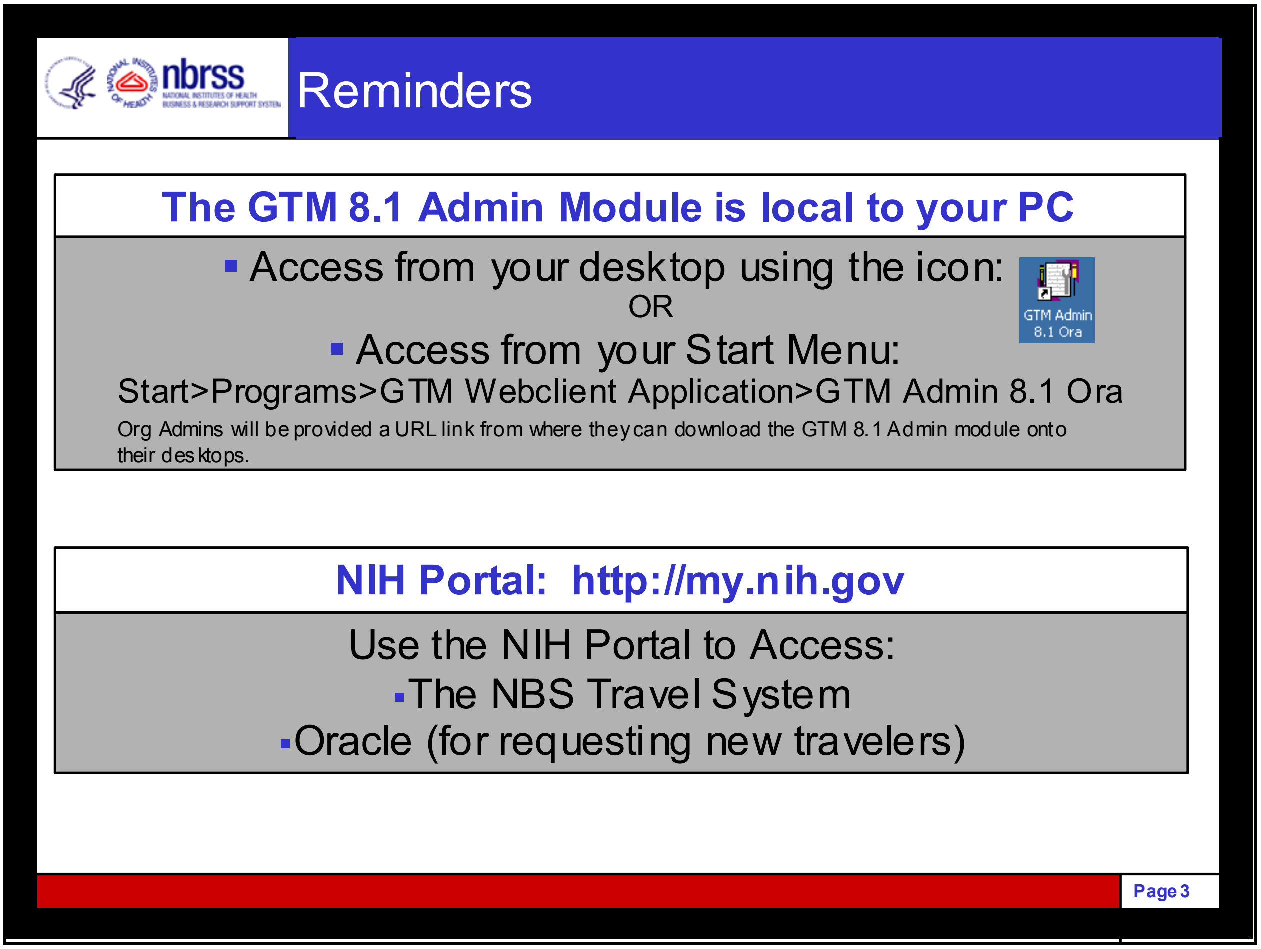
Chapter 6


Wrap Up
February, 2004

NBS Travel Support Resources

- NBS Travel Web links available 24/7
  - NBS Website: http://nbs.nih.gov
- NIH Portal Support
  - Phone NIH Help Desk at 6-HELP (301.496.4357)
  - Portal website address: **http://my.nih.gov**
- NBS Customer Support
  - Phone: Call 6-HELP (301.496.4357)
  - E-mail: Send e-mail to helpdesk@mail.nih.gov
  - Web Request for Support: Submit to: **http://support.cit.nih.gov**
- nVision
  - nVision is an evolution of the NIH Data Warehouse, and it is the new reporting system designed to work in concert with the NBS. nVision is a business intelligence system that delivers NIH-defined standard reports and facilitates the development of user-created ad hoc reports to support decision-making and analysis. The first NBS module to be supported by nVision is Travel.
  - E-mail: Send e-mail to nVisionSupport@nih.gov
  - Web Site for information: **http://nvision.nih.gov**

Page 2


nbrss
NATIONAL INSTITUTES OF HEALTH BUSINESS & RESEARCH SUPPORT SYSTEM
Reminders
The GTM 8.1 Admin Module is local to your PC
▪ Access from your desktop using the icon:
GTM Admin 8.1 Ora
OR
▪ Access from your Start Menu:
Start>Programs>GTM Webclient Application>GTM Admin 8.1 Ora
Org Admins will be provided a URL link from where they can download the GTM 8.1 Admin module onto their desktops.
NIH Portal: http://my.nih.gov
Use the NIH Portal to Access:
▪The NBS Travel System
▪Oracle (for requesting new travelers)
Page 3

Evaluation

- Please complete the Course Evaluation provided to you by your instructor

Page 4

Wrap Up

Appendix

Chapter 7

Appendix A--Glossary of Terms

Glossary of Terms—NBS & GTM 8.1 Administration Module vs. ADB

NBS Travel Term	Definition	Associated ADB Travel Description
1. Document	An electronic authorization, voucher, amendment or other record of travel or travel-related expenses.	A hard copy authorization, voucher, amendment or other record of travel or travel-related expenses and accompanying paperwork.
2. Document Status	Routing history by signature	
3. Dynamic Routing	Dynamic routing provides users with the flexibility of selecting reviewing/approving officials at the time that they stamp a document.	
4. Edit	Make changes to a record.	Make change
5. Gelco, Inc.	Name of the company that designed and markets the Travel Manager product.	
6. Group	A composition of travelers who have something in common. In the NBS Travel System, Groups are established based on members within an Institute/Center.	
7. Organization:	The organizational hierarchy within Travel Manager to accommodate automated document routing.	Organizational identity extracted from a designated CAN.
8. Permissions	A level of access within Travel Manager limiting the number of users who can perform certain functions or tasks.	Access to system functionality granted by Node Assignment.
9. Role	Roles contain one or more approving officials' signature records. Roles are assigned to routing lists.	
10. Routing List	A list of recipients for a travel document. Routing lists are designed to facilitate electronic review of documents. Routing lists are created for each type of document (e.g., authorizations, vouchers, and local vouchers).	
11. Signature in a Role	A person that performs that Role. Signature records for those individuals in Roles have effective and expiration dates.	
12. Signature Status	Signing code of each person in the routing path that has handled the travel document (e.g., prepared, certified, conditional approval, approval, etc.).	
13. Stamp	Allows 'electronically signed' document to route to the next person in chain of authority.	

Process Name Descriptions

This appendix provides a list of all the available audits. A description is provided for each audit. The Routing Test column indicates whether the audit is available as a routing test. The Document Type(s) column indicates which documents (authorizations, vouchers, and local vouchers) can use this audit. The Parameters column indicates the type of parameter that can be used with the audit.

Process Name	Description	Routing Test	Parameter	Document Type
ACCT CODES AUTHORIZED	Verifies that the voucher was submitted with the same accounting code(s) that were used for the authorization.	Yes		Voucher
ACCT CODES EXIST	Verifies that the accounting codes entered on the document are valid codes in the master list of accounting codes.	Yes		Authorization Voucher Local Voucher
ACTUAL MULTIPLIER	If actual expenses were claimed on the voucher, checks that the amount claimed did not exceed the limit set in Calculation Defaults/Actual Lodging Multiplier and Actual M&IE Multiplier.	No		Voucher
ACTUALS AUTHORIZED	If actual expenses were claimed, verifies that they were on the authorization.	No		Voucher
ACTUALS EXIST	Verifies if actuals exist for lodging and M&IE.	Yes		Authorization Voucher
ADVANCE AUTHORIZED	Permits a requested advance if the amount of that advance is less than or equal to the computed authorized advance amount. The audit fails if the requested advance is more than the authorized advance.	Yes		Authorization
APPLIED ADVANCE	Looks for voucher documents where the total advance(s) for this authorization has been applied to the voucher.	Yes		Voucher

Process Name	Description	Routing Test	Parameter	Document Type
APPROVAL BY TRAVELER	Checks to see if the traveler stamped the document with the parameter document status code. If so, the document fails the audit. For example, if the parameter is set to REVIEWED, when the audit is run, the routing history is checked for the existence of a stamp of REVIEWED by the traveler.	Yes	Document Status Code	Authorization Voucher Local Voucher
AUTHORIZATION EXIST	Looks for the existence of an authorization that has the corresponding authorization number on the voucher.	Yes		Voucher
AUTO ROUTE	Checks the document status code history for the signature “SYSTEM ADVANCED”. The document will fail the audit if it has been stamped by “SYSTEM ADVANCED.”	Yes		Authorization Voucher
AWAITING CTO	Checks to see if the document’s reservation status code matches the parameter.	Yes	Reservation Status Code	Authorization
CASH ADVANCE EXISTS	If a cash advance exists, the document fails the audit.	Yes		Authorization
COMMENTS	Checks for any comments in the comments area. This highlights documents that may contain special circumstances/explanations.	Yes		Authorization Voucher Local Voucher
CONFERENCE ALLOWANCE	Checks documents for the existence of conference allowance lodging. The document will fail the audit if conference allowance lodging exists.	Yes		Authorization Voucher
COST COMPARISON	Compares voucher trip total (sum of all reimbursable and non-reimbursable costs) against the total	Yes	In order for this audit to work properly	Voucher

Process Name	Description	Routing Test	Parameter	Document Type
	estimated cost on the corresponding authorization using a percentage parameter (i.e., is the voucher cost greater than the specified parameter percentage of the authorization estimate).		vouchers, the parameter must be either set to zero (0) or left blank.	
COST LESS COM. CARR	Sums all expense categories except those that begin "COM" and compares them to the parameter dollar amount. If this audit fails it sends an e-mail to the traveler (Receipt.ltr).	Yes	Dollar Amount Integer (type numeric characters only)	Authorization Voucher
CUSTOM LOCATION USED	Checks the document per diem locations for a custom location.	Yes		Authorization Voucher
DAILY EXPENSE THRESH	Compares transportation expense amounts against the Daily Threshold value in the Travel Modes table and non-transportation expenses against the Daily Threshold value in the Expense List table.	Yes		Authorization Voucher
DFLT PMT METHOD USED	Checks all expenses on a document to determine if the payment method was changed from the default setting. The document fails the audit if the payment method was changed from the default.	Yes		Authorization Voucher
DUAL LODGING COSTS	Dual lodging refers to trips that have nested TDY locations. For example, if you are in Cleveland, for the first 4 days of the trip, then are in Chicago for 2 days, and then back to Cleveland for 3 more days while maintaining lodging in Cleveland. Ensures that the dual lodging expense does not exceed the lodging allowed at the TDY location where the dual	Yes		Authorization Voucher

Process Name	Description	Routing Test	Parameter	Document Type
	lodging exists. The document passes the audit if the dual lodging expense is less than or equal to lodging allowed for the previous TDY station in the itinerary. The document fails the audit if the dual lodging expense is greater than lodging allowed at the previous TDY station in the itinerary.			
DUPLICATE TA NUMBER	Searches for vouchers with the same TA number. The document fails the audit when a duplicate TA number is found. Duplicate TA number does not include constructed vouchers (multiple trip numbers).	Yes		Voucher
EXP CAT $ VARIANCE	Compares the voucher trip expense categories (using the Maximum Variance value in the Expense Categories table) against the expense categories on the corresponding authorization (i.e., are the voucher expense category amounts within a specified dollar amount of the authorization expense category amounts).	No		Voucher
EXP CAT % VARIANCE	Compares the voucher trip expense categories (using the Percent Variance value in the Expense Categories table) against the expense categories on the corresponding authorization (i.e., are the voucher expense category amounts within a specified percent of the authorization expense category amounts).	No		Voucher
EXP CATEGORY USED	Checks the document for the existence of the Expense Category	Yes	Name of the Expense Category	Authorization Voucher Local

Process Name	Description	Routing Test	Parameter	Document Type
	parameter specified. For example, if the parameter is Tax, the document fails the audit if any expenses that are associated with the expense category Tax exist.			Voucher
EXP $ VARIANCE	Verifies only those expenses which require authorization (if the Authorization Required field is enabled in the Travel Modes table and the Expense List table). It compares voucher trip expenses against the estimated expenses on the corresponding authorization (using the Maximum Variance value from the corresponding table) (i.e., are the voucher expenses within a specified dollar amount of the authorization expenses).	No		Voucher
EXP % VARIANCE	Verifies only those expenses which require authorization (using the Authorization Required value in the Travel Modes table and the Expense List table). It compares voucher trip expenses against the estimated expenses on the corresponding authorization (using the Percent Variance from the corresponding table) (i.e., are the voucher expenses within a specified percent of the authorization expenses).	No		Voucher
EXPENSE CATEGORIES	Verifies that the total expenses for any expense category do not exceed the Threshold value in the Expense Categories table. Also verifies that the expense category exists. This audit is scoped by the traveler's organization;	Yes		Authorization Voucher Local Voucher

Process Name	Description	Routing Test	Parameter	Document Type
	therefore, the audit fails if traveler doesn't have access to an expense category on the document.			
FOREIGN TRAVEL	Checks for any travel outside the U.S.	Yes		Authorization Voucher
GROUP AUTHORIZATION	Checks to see if the document is a Group Authorization.	Yes		Authorization
LAUNDRY/DRY CLEANING	Checks the document for the existence of a Laundry/Dry Cleaning expense. The audit fails if the Laundry/Dry Cleaning expense was claimed for a trip less than 4 nights.	Yes		Authorization Voucher
LEAVE AUTHORIZED	Determines if leave days were taken as part of the voucher and verifies that the leave was requested on the authorization.	Yes		Voucher
LEAVE EXISTS	Checks the document for the existence of annual or non-duty leave.	Yes		Authorization Voucher
MEALS AVAILABLE	Checks the per diem locations on the document to see if meals are available.	Yes		Authorization Voucher
NON-CONTRACT FARE	Checks to see if a non-contract fare was used.	Yes		Authorization Voucher
OTHER AUTHORIZATIONS	Checks the document for the existence of Other Authorizations not listed in the Other Authorizations table.	Yes		Authorization
OTHER AUTH USED	Checks the document for the existence of the Other Authorization parameter specified. For example, if the parameter is Annual Leave or Non-Duty Days, the document fails the audit if the Other Authorization Annual Leave or Non-Duty days exists.	Yes	Name of Other Authorization	Authorization
	Verifies that each expense	Yes		Authorization

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OTHER EXPENSES	does not exceed the Single Threshold value set for the expense in the Expense List table.			Voucher
OVERRIDE	Checks the document to see if overrides exist for M&IE.	Yes		Authorization Voucher
PER DIEM LOC AUTH	Checks corresponding authorization for per diem locations.	Yes		Voucher
PER DIEM RATES	Verifies that the per diem rate used to calculate the document is the most current rate for the TDY location in the per diem table.	Yes		Authorization Voucher
PERSONAL INFO - ALL	Verifies that all of the traveler information entered in the document is the same as in the Traveler Information table.	No		Authorization Voucher Local Voucher
PERSONAL INFO - KEY	Verifies that the First Name, Last Name, Middle Initial, Charge Card, Work Hours, and Routing List in the traveler information entered in the document is the same as in the Traveler Information table.	Yes		Authorization Voucher Local Voucher
PMT METH AUTHORIZED	Compares the payment method used for expenses on the voucher to the payment method used for expenses on the corresponding authorization. The document fails the audit if the payment methods are different.	Yes		Voucher
QUARTERS/MEALS OVERRIDE	Checks the per diem locations on the document to see if meals and/or quarters are available. If they are, then the audit checks for any differences between what is available and what is used for lodging and meals.	Yes		Authorization Voucher

Process Name	Description	Routing Test	Parameter	Document Type
SIGNATURE VERIFY	Three tests: Checks the signatures on the document against the routing list to verify that the correct individuals signed the document in the correct order. Verifies that the document has not been adjusted since it was signed. If the parameter Sigload is specified, compares the public signature key to determine if the auditor's database contains the latest public key for the signer.	Yes		Authorization Voucher Local Voucher
SPECIAL MEAL RATE	Checks to see if a special rate was used in lodging costs.	Yes		Authorization Voucher
TRAVEL DATE OVERLAP	Checks all of the travel documents for a given traveler to see if more than one voucher had been submitted for the same time period.	No		Voucher
TRAVEL EXPENSES	Verifies that all expenses entered on the document match a valid entry in the Local Travel Expenses table.	Yes		Local Voucher
TRAVEL MODES	Verifies that all travel modes entered on the document match a valid entry in the Travel Modes table and verifies that each travel mode does not exceed the Single Threshold value set for the travel mode in the Travel Modes table.	Yes		Authorization Voucher
TRAVEL MODES AUTHORIZED	Verifies that the travel modes used on the voucher are the same that were used on the authorization.	Yes		Voucher
TRIP DATES & LOCS	Determines whether the traveler went to locations that were not authorized as part of the authorization.	Yes	Enter the number of days (integer)	Voucher

Process Name	Description	Routing Test	Parameter	Document Type
	This audit also checks to make sure the dates are valid within the number of days specified as the parameter. For example, if the parameter is 5 then the audit makes sure the voucher departure and return dates are within 5 days of the authorization's departure and return dates. Also, compares the trip type on the authorization and voucher. If the trip types do not match, the voucher fails the audit.			
TRIP DURATION	Verifies the trip duration. If the trip duration is greater than the parameter entered, the document will fail the audit. For example, if the parameter is 60 and the trip duration is 61 days, the audit will fail.	Yes	Enter the number of days (integer)	Authorization Voucher
TRIP PURPOSE USED	This test checks to see if the traveler used a certain trip purpose on a document. This is based on the trip purpose name entered as the parameter.	Yes	Enter the trip purpose	Authorization Voucher
TRIP PURPOSES	Verifies that the trip purpose on the document matches a valid entry in the Trip Purposes table (by the traveler's organization).	Yes		Authorization Voucher
TRIP TYPES	Verifies that the trip type information entered in the document matches a valid entry in the Trip Type table (by the traveler's organization).	Yes		Authorization Voucher
VARIATIONS AUTH	This test checks for the Other Authorization VARIATIONS AUTHORIZED: if it exists then the test is over; otherwise it runs the VCH DIFF AUTH audit to	Yes		Voucher

Process Name	Description	Routing Test	Parameter	Document Type
	compare the voucher to the authorization (see below).			
VCH DIFF AUTH	If the parameter is TRUE, the OTHER AUTH USED audit is run with a parameter of 'Variations Authorized'. If the audit fails (the other authorization exists), then the test is over. If the audit passes (the other authorization does not exist), or the parameter is FALSE or blank, this audit runs the following other audits in this order: AUTHORIZATIONS EXIST ACTUALS AUTHORIZED APPLIED ADVANCE ACCT CODES AUTHRZD TRIP DATES & LOCS EXPENSES OBLIGATED LEAVE AUTHORIZED PER DIEM LOC AUTH TRAVEL MODES AUTHRZD COST COMPARISON EXP % VARIANCE EXP $ VARIANCE EXP % VARIANCE EXP CAT $ VARIANCE If any of the above audits fail, then the VCH DIFF AUTH audit test fails (stops) there.	Yes	True or False (optional)	Voucher
VESSEL TRAVEL	If Aboard US Vessel is selected in the Update Lodging and M&IE window and the itinerary indicates only one TDY location, the audit fails. When vessel travel is selected, GTM 8.0 requires two TDY locations for the itinerary (for embarkation and debarkation locations).	Yes		Authorization Voucher

Process Name	Description	Routing Test	Parameter	Document Type